VISION 2047

THE INDIAN FOOTBALL STRATEGIC ROADMAP (2023-2047)

MESSAGE FROM THE PRESIDENT

It is with great pleasure that I present to you for the first time a roadmap that serves as a plan for the Indian footballing ecosystem on a whole, instead of a plan for only the federation. “Vision 2047” paints a picture of where we want to position Indian football at the outset of a hundred years of our nation’s independence. At a time when India’s role is becoming increasingly prominent on the world stage, we embark on a journey as ambitious as our nation itself.

However, this is not a journey for the federation alone but one that will be traversed together by every entity that is connected to Indian football. With a shared vision and shared responsibilities, we can implement targeted programmes to address the key areas identified in this roadmap and join forces in building capacity for the football ecosystem. Through such dedicated efforts, I dream of reviving the glory days of Indian football in the 1950s and 60s and becoming a powerhouse of Asian football again.

It is our right to dream and our duty to do everything it takes to fulfil that dream, and together, we can aspire to take Indian football to peaks never scaled before.

Kalyan Chaubey,
President, All India Football Federation

FOREWORD FROM THE SECRETARY GENERAL

Our strategic roadmap aims to transform Indian football by means of a proactive leadership and team at the All India Football Federation that is prepared to work towards the ambitious targets set out in this document. Transformation will begin at home through a reform of the organizational culture. A restructuring exercise will be carried out to streamline current operations and develop a team with improved competencies, leading to an alert and agile secretariat that has adopted the best practices across the industry and is transparent in its dealings.

A focus on increasing the commercial viability by creating economic value for all our stakeholders, especially players, will be the cornerstone of the renewed secretariat. This will develop footballers with higher proficiencies across the country and build a strong pool of elite talent for the national teams. This approach of "Reset. Reform. Restructure. Revolutionize." would lay the foundation for a powerful growth story for Indian football in the next 25 years. The Federation would be celebrating its centenary year in 2037 and we believe this should be milestone year that sees us amongst the top 7 countries in Asia to begin with. Through our dedicated teamwork and collaborative approach, we can expect to achieve our strategic goals of our strategic roadmap which would prove to be an impact full growth story not only for Indian football but also for global football.

India with its rich cultural heritage, ever growing economy and blessed with a human capital, we can expect India becoming a vibrant football destination for the world when we celebrate our centenary year of independence in 2047. Over time, AIFF intends to set an example of operational excellence and good governance for sports.

Dr. Shaji Prabhakaran,
Secretary General, All India Football Federation

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LIST OF ABBREVIATIONS

AIFF – All India Football Federation

FA – Football Association

District FA (DFA) – District Football Association

MA – Member Association / State Football Association

SAI – Sports Authority of India

MYAS – Ministry of Youth Affairs and Sports

CAF - Confederation of African Football

AFC - Asian Football Confederation

UEFA - Union of European Football Associations

CONCACAF - Confederation of North, Central American and Caribbean Association Football

OFC - Oceania Football Confederation

CONMEBOL - Confederación Sudamericana de Fútbol

01

AN INTRODUCTION

SPORTS WAVE ACROSS INDIA

India today is going through a wave of transformation in the field of sports. Supported by the central government leadership taking special Interest in enlarging India's global sporting footprint and backed by large corporate houses. Driven by the rising public interest in sporting events, the sports industry in India is expected to continue to grow in the coming years, offering new opportunities for all stakeholders.

Under the Leadership of the Honourable Prime Minister, India has undertaken a focused approach on the holistic development of Sports in India. Having invested in multiple sporting events including two FIFA U17 world cups, the budgetary allocations for sports has seen a rapid growth.

Sports fall under the purview of the state governments we are slowly seeing more states embrace the social and health impact sports has on societies. Certain State government have championed the cause leading to a spurt in sporting success even at an international level. Success in sports such as hockey, badminton, wrestling and athletics have been instrumental in growing the popularity of larger bouquet of sporting disciplines with women's sports being a cornerstone of our recent success stories.

An Outburst of Professional Sport League

IPL has been followed by multiple professional leagues across sports:

Football
Kabaddi
Wrestling
Hockey
Volleyball
Badminton
Basketball
Table Tennis
Lawn Tennis

Corporate & Foreign Investments

- Indian Corporates have started investing in sports with long term horizon
- Inflow of foreign investment by giants like La Liga, Bundesliga, NBA, etc.
- Increased commercialization opportunities

Government Focus and Initiatives

- Increasing central govt budget allotted to sports supported by initiatives like Khelo India
- Policies around Sports development through Sports Regulatory bodies (SAI, Federations etc.)

Social Acceptance as a career choice

- New Generation of parents are stronger advocates of the importance of sports
- Increased viewership in sports fueled by the rise in digital media

AN OVERVIEW OF INDIAN FOOTBALL

India's tryst with football started 150 years back, the British arriving to harvest the golden sparrow's spice, and in the process introducing a new one — that inflames passions, ignites tensions and provokes devotion — to the country. Adoption of the game in those initial days was fragmented — Kolkata, Hyderabad, Mumbai, each serving as a helm — expanding with the movement of the East India Company's growth. And despite an initial hesitancy, Indians took to football with ease, playgrounds, parks and even fields serving as a stage to explore, play if not actively compete.

And then arrived the August that transformed Indian football and India's attitude towards the game itself. Mohun Bagan's triumph in the IFA Shield on August 29, 1911 turned football from a pastime into an act of revolution, a way of scoring a goal against the colonial masters who held the whip. Football wasn't just a game, it was a way of offering countenance to a movement, a way to glorify it too. By the time the British left, heralding in a new independent dawn, the game had taken root in a way few can imagine today.

AN OVERVIEW OF INDIAN FOOTBALL

A golden age followed, and appropriately at a time when the country was yet discovering itself. The legends of Ahmed Khan, Sailen Manna, Talimeren Ao were followed by Chuni Goswami, PK Banerjee, Tulsidas Balaram, Jarnail Singh, each generation determined to outdo the other's achievements. India won gold at the Asian Games in 1951, and in 1962, and even left their mark on the world stage, finishing fourth in the 1956 Olympics. Crowds swelled, fandom did too, and clubs jostled for attention, even as new frontiers were constantly discovered.

Consumed internally, refusing to look outside, a period of stagnation set in. At a period when the sport expanded into the global behemoth we see today, India fell behind. A surge in commercialisation within the global game was not capitalised upon, and Indian football suffered.

Despite a glut of extraordinarily talented players like IM Vijayan, Jo-Paul Ancheri, Bhaichung Bhutia and Sunil Chhetri India's footballing standards had fallen behind the global level. A rethink in strategy led to a reshuffle at the top of the pyramid, the National Football League introduced, followed by the I-League and the Indian Super League to help market the sport better and get more eyeballs into the game. The I-League followed suit, as better markets were explored. At the grassroots there was an upheaval of the system, the demand for formal structures louder and plain.

There were obvious benefits, the introduction of better methods, training, knowledge, and technology leading to a rise in the rankings and performances. India qualified for the 2019 AFC Asian Cup, and even won their first game in the competition in decades, emphatically thumping Thailand in the opener.

An influx of foreign coaches in the domestic game helped develop not just players but also a new generation of Indian coaches. Within the domestic game today, there are more young coaches than ever before, many former internationals also acquiring licenses and taking charge of professional clubs and academies across the country.

The country played host to the U17 World Cup in 2017 — a first for the country — and the U17 Women's World Cup last year. The two were sandwiched by the conduct of the AFC Women's Asian Cup. The work at the youth level is reflected in the results. India have qualified for the third time in a row for AFC U17 Asian Cup, the 2023 edition to be held in Thailand this year.

AN OVERVIEW OF INDIAN FOOTBALL

Despite the influx of money at the top of the pyramid, at the grassroots, gaps prevailed. A lack vibrant football structure across the pyramid meant the game's growth was stunted and restricted to certain pockets. Participation had been steadily growing in Urban cities. However, whilst there was a substantial appetite for the global game, there was often little or no connect at the local level.

Within the women's game there was progress, but in a limited way. For a period of almost two years the women's national team failed to play an international fixture, and the lack of a professional league, or even clubs meant women footballers were left cold. The Indian Women's League (IWL) brought in some game time, but its inadequacies soon became clear. From being Asian medallists, Indian Football had to suffer the ignominy of not getting funding to compete at the 2018 Asian Games , denied the chance due to a 'lack of performance'.

All the success extracted its own cost. Despite the eyeballs, and the improvements interest in the game was dwindling. A change was demanded, and in September this year, after a brief period of indecision and other hurdles, it arrived, bringing with it renewed hope.

Over the last four months the All India Football Federation has undertaken the arduous task of overhauling the entire ecosystem. With its mantra of 'Reform', 'Reset' and 'Restructure' the Federation has already restructured it's own organisation, undertaken key strategic decisions and initiated multiple projects that should be instrumental in changing the face of Indian Football in the coming years. Promotion structures into the top division which was long due, was implemented and the 'Indian Arrows' project was disbanded with the aim to focus on a broader talent pool through more competitions.

With a Focused approach on Sports from the Government, increased participation and public interest, India today sits on the potential of becoming a global sports superpower. However, for India to fulfil her potential and truly arrive on a global football stage, it would require every Individual and institution associated with our beloved game to embrace change.

Change demands a fresh start and yet, there is a lot to learn from the past.

INDIAN FOOTBALL IN NUMBERS

36
Affiliated Members

146900
Registered Players
8.3% women

3655
Registered Clubs

6354
Active Referees
9.6% women

23
ISL & I-League Clubs

106
Men's FIFA Ranking

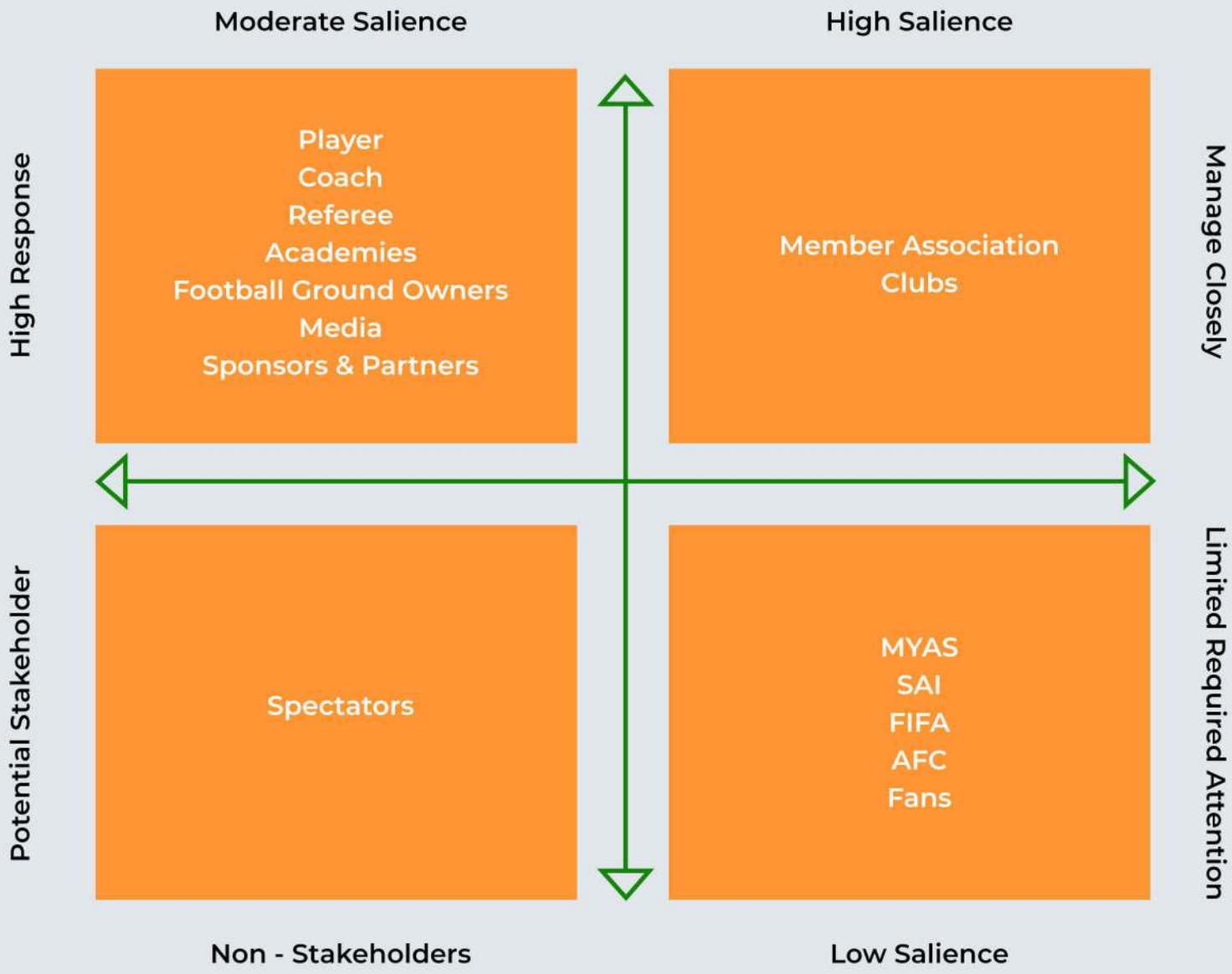
61
Women's FIFA Ranking

35107
Grassroots Players
10.5% women

8479
Licensed Coaches
8.2% women

12
IWL clubs

STAKEHOLDERS ANALYSIS FROM THE AIFF'S PERSPECTIVE



02

THE ORGANIZATION DIRECTION

VISION

To make football an incredible sport for incredible India by building an ecosystem which would be a value proposition not only for India but for the world.

MISSION

Football to be a sport of the masses, with a focus on driving joy in communities, fostering excellence and being an agent of social change through teamwork & collaboration

VALUES

INTEGRITY

Run the association with utmost integrity, sincerity, honesty and transparency.

RESPECT

Promote and develop a culture of respect among all stakeholders; team-mates, coaches, officials, clubs and other institutions etc.

EXCELLENCE

Strive for excellence through integral improvements and developments to achieve highest of standards to inspire players, coaches, referees, and clubs for greatness.

INCLUSION

Direct our efforts towards football development and promotion without discriminating and taking everyone together.

TEAMWORK

Promote teamwork and camaraderie among stakeholders for we will be much strong together and can achieve our goals efficiently.

03

VISION 2047 – AN INTRODUCTION

VISION 2047

A phased approach towards being leaders in Asia and one of the top football talent hubs for the world.

There will be six strategic plans designed during this phase with a purpose to achieve our Vision, 2047.

- Strategic Plan 2023 - 26
- Strategic Plan 2027 - 30
- Strategic Plan 2031 - 34
- Strategic Plan 2035 - 38
- Strategic Plan 2039 - 42
- Strategic Plan 2043 - 47

FOCUS ON CORE AREAS

THE YEAR 2047

- Among top 4 in Asia
- Having a vibrant football ecosystem in India
- One of top 3 Football Leagues in Asia across genders
- At least one iconic player with International stardom in both Men's and Women's Football

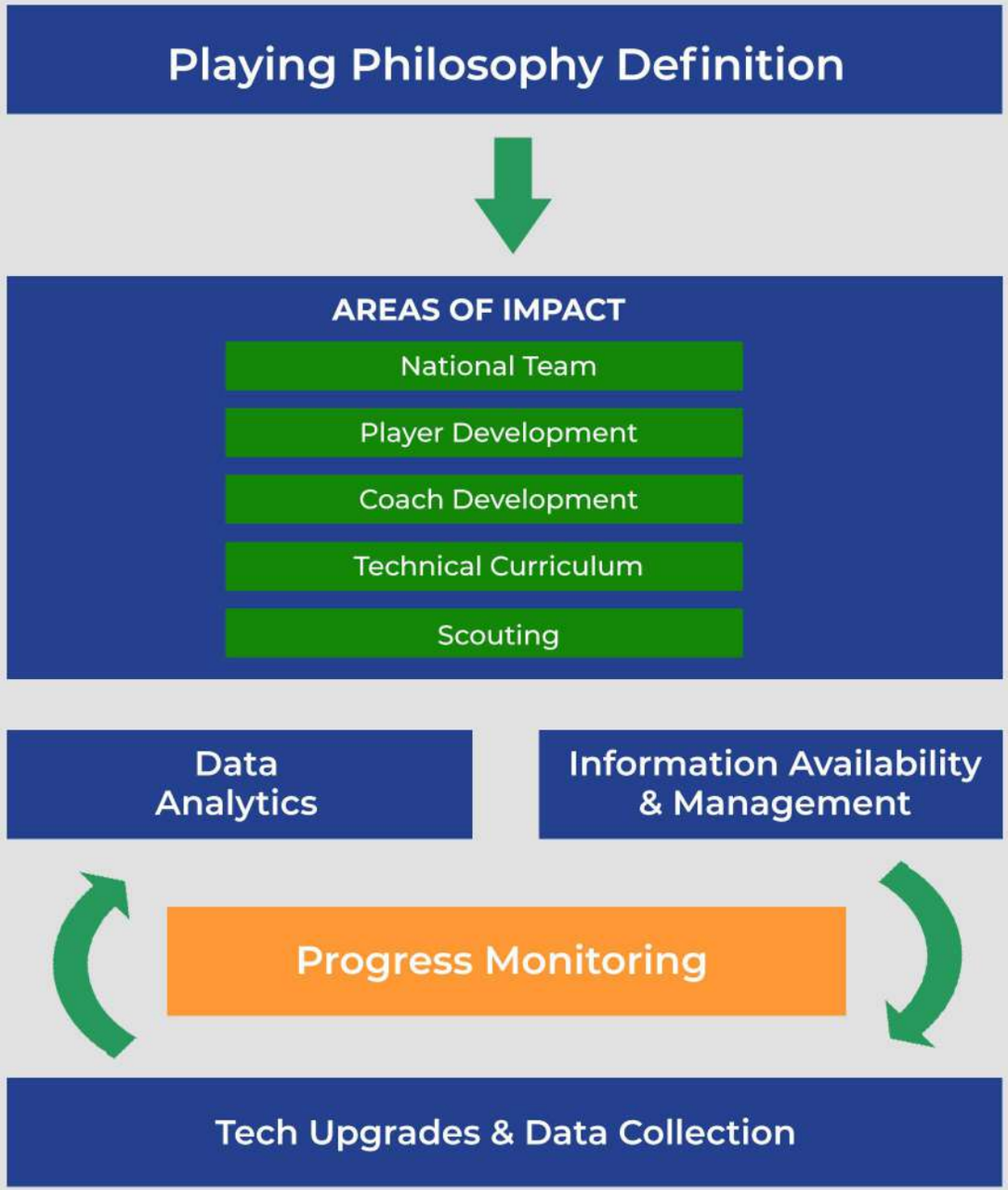
NATIONAL FOOTBALL PHILOSOPHY

India needs to build a Football Philosophy to be consistent and is reflective of the basic sporting fabric of the country. Driven by a scientific approach it would be the cornerstone behind a successful national team playing an attractive brand of football that is rooted in our own strengths.

To build that foundation, we need to know what kind of Football, would help us achieve that. In other words, we need to have a written '**National Football Philosophy of India**'

That would require us to

- Understand the evolution of Modern Football
- Study different philosophies/models that have been used across countries, the approach they have taken, and the background work around it
- In depth study of various aspects of player development, coaching, talent Identification and ideal competition structures
- In depth study of India, our culture, our history, the diversity, people etc.



STRATEGIC PLAN 2023-26

OUR CORE AREAS

1 GOVERNANCE

GOAL

To govern football with utmost integrity, inclusivity, through teamwork & collaboration and become an example of Good Governance.

GOVERNANCE

Good governance is not a choice but a necessity to achieve excellence.

Best governed sporting organizations have proper regulatory framework that protect stakeholder's interests, guarantee the integrity of sports events and social and environmental responsibility, and have strict control mechanisms on the allocation and use of development funds. Hence, creating value not only for the Sport, but also the community at large.

Our Observations

- Lack of existing capacity to adopt good governance practices largely due to a lack of funds leading to a dearth of full-time professional roles
- Sports being a state subject, constitutions and invariably varied governance models are prevalent across different Member Associations
- Proactive self-regulatory approach is not followed leading to structural weaknesses
- Limited stakeholder consultation and dialogue
- Short sighted goal setting by most entities within the ecosystem
- Scope to bring efficiencies in Process Execution and Accountability through digital adoption
- Lack of inclusivity in Governance structures across the ecosystem

GOVERNANCE

Our Objectives

- Adopt modern best practices and universal principles of Good Governance
- Taking consistent Proactive measures to govern the sport and mitigate the challenges of the evolving landscape of Football
- The Organization – Redefine, Rebrand, Restructure
- Ensure representative positions in governing bodies reflecting gender balance, diversity and fair geographical representation
- Empower Member Associations by supporting them with Capacity Building
- To have inclusive measures to create more opportunities for Women in Football
- Build a foundation focused on taking Football to marginalized sections of society
- Design and implement a financial redistribution policy and programs for our primary stakeholders

GOVERNANCE

The Organization – Redefine, Rebrand, Restructure

The Direction (Mission / Vision / Values)	• Reassessing Mission, Vision, and Values • Ensuring reflection of these values in our processes and interaction through our people
Realigning Indian Football Brand	• Realigning 'Indian Football' brand to for enhancing Recognition, Trust, and Professionalism • Redefining Elements of 'Indian Football' Brand Identity
Organisation Restructuring	• Redefining Processes and Functional Areas • Roles, responsibilities, and accountability

GOVERNANCE

New Organization Structure

Foundation

General Body

Executive Committee — Standing Committees & Judicial Bodies

President

Secretary General

AIFF Secretariat

Strategy & Planning
Special projects FIFA & AFC relations

Governance & Administration

Legal & Compliance | Finance | Government Relations | Player Status & Registrations | Technology & IT | Logistics & Protocol | Human Resource & Welfare | Infrastructure Management | Security & Integrity | Safeguarding

Football Development

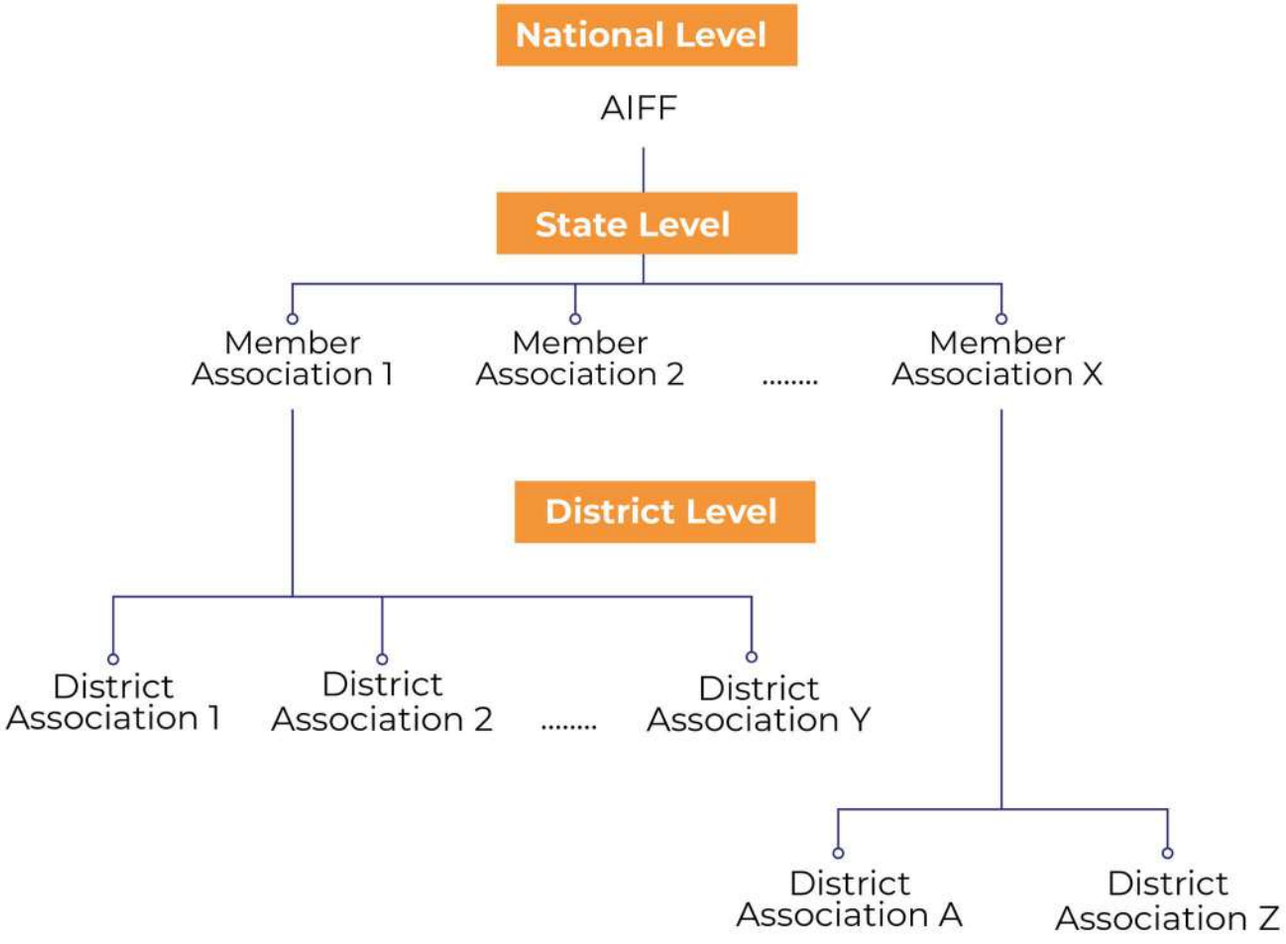
National Team | Member Associations | Women's Football | Clubs & Licensing | Technical Development & Education | Competitions | Refereeing | International Relations | Football Science & Analytics

Business & Marketing

Marketing & Branding | Consumer Servicing | Broadcasting | Licensing, Merchandising & Sales | Media & Communications | Public Relations | Partnerships & Collaborations

GOVERNANCE

Customized Capacity Building to MAs



Program is to take the state to next level in Football Pyramid by providing highly relevant 'Support Solutions'

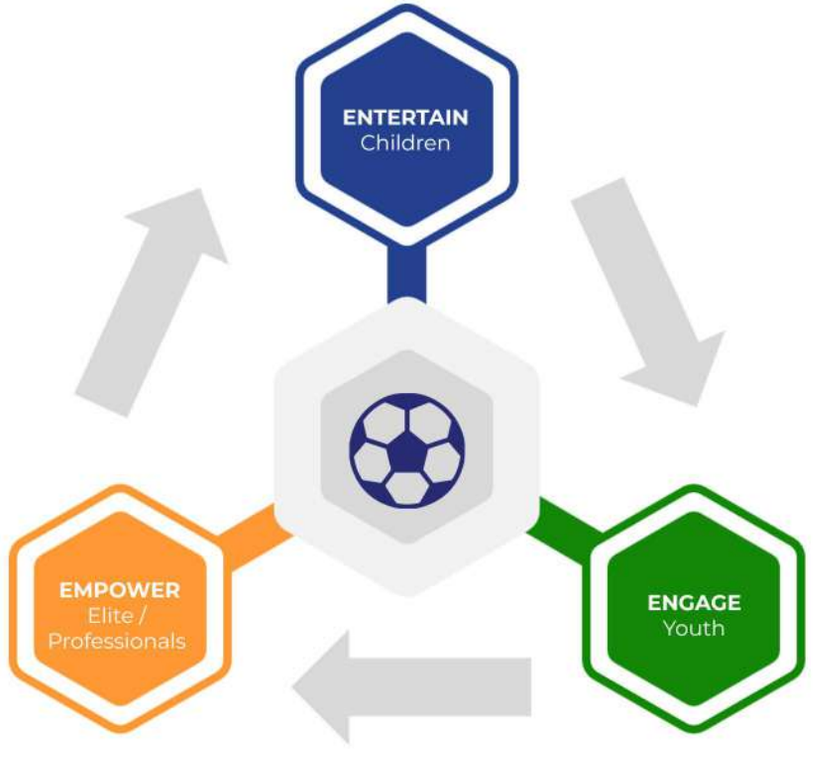
GOVERNANCE

To create more opportunities for Women Football

While Women's Football is the fastest growing vertical across the world, historically it has been one of the areas with the least focus.

In India, the ecosystem around Women's Football is significantly weaker as compared to that for Men. Hence, we need solutions designed specifically for Women to increase the all-around participation and technical level in women's football across the ecosystem.

- Make Football the sport of choice for female athletes across the country
- Greater adoption of women's football by club structures across the pyramid
- Dedicated Women's football department within AIFF
- Harness Football as an agent for social upliftment of women
- Incentivize Female Coaches, Referees and Match Commissioners
- Greater Inclusivity in Football Administration across the ecosystem
- Creation of more opportunities for Women through Policy intervention
- Minimum salary for Women's Players



GOVERNANCE

Football Inclusion through 'The Foundation'

An entity will be created with a focus on bringing positive social change in India through Football & Associated Activities.

Some of the areas that will be targeted through various programs under 'The Foundation' are:

GOVERNANCE

TARGET 2026

- 100% of Member Associations to adopt good governance practices
- Member Associations to revise and adopt its statutes in line with that of AIFF for Good Governance
- Policies, Regulations and Guidelines to be re-aligned to our objectives along with 'Feedback Mechanisms' in place to be one of the best governed sports organizations
- Objective framework in place to evaluate our governing performance
- A clear anti-discrimination policy

VISION 2047

- Functioning as highly efficient and transparent sporting organization having apt governance structure and framework
- Each State to have :
  - A strong governance structure inline with AIFF to optimally deliver all aspects of football which leads to India achieving its goals and vision
  - A robust football framework with adequate infrastructure, professional management and commercial sustainability

2 INFRASTRUCTURE

GOAL

Advocating an enabling policy framework from relevant authorities through a collaborative approach to attract sizeable investments in developing infrastructure for competitions and Football Development across the country.

INFRASTRUCTURE

For an improvement in quantity and eventually quality of Football in a country, the number of accessible playing surfaces needs to increase.

While full sided pitches are critical to allow matches and formal training, small sided pitches have proven to be a game changer globally as players get to spend more time with the ball and it facilitates the intensive technical development needed in a learning phase.

Football stadiums are increasingly crucial to the commercial strategies of football clubs from selling branding rights to matchday revenue.

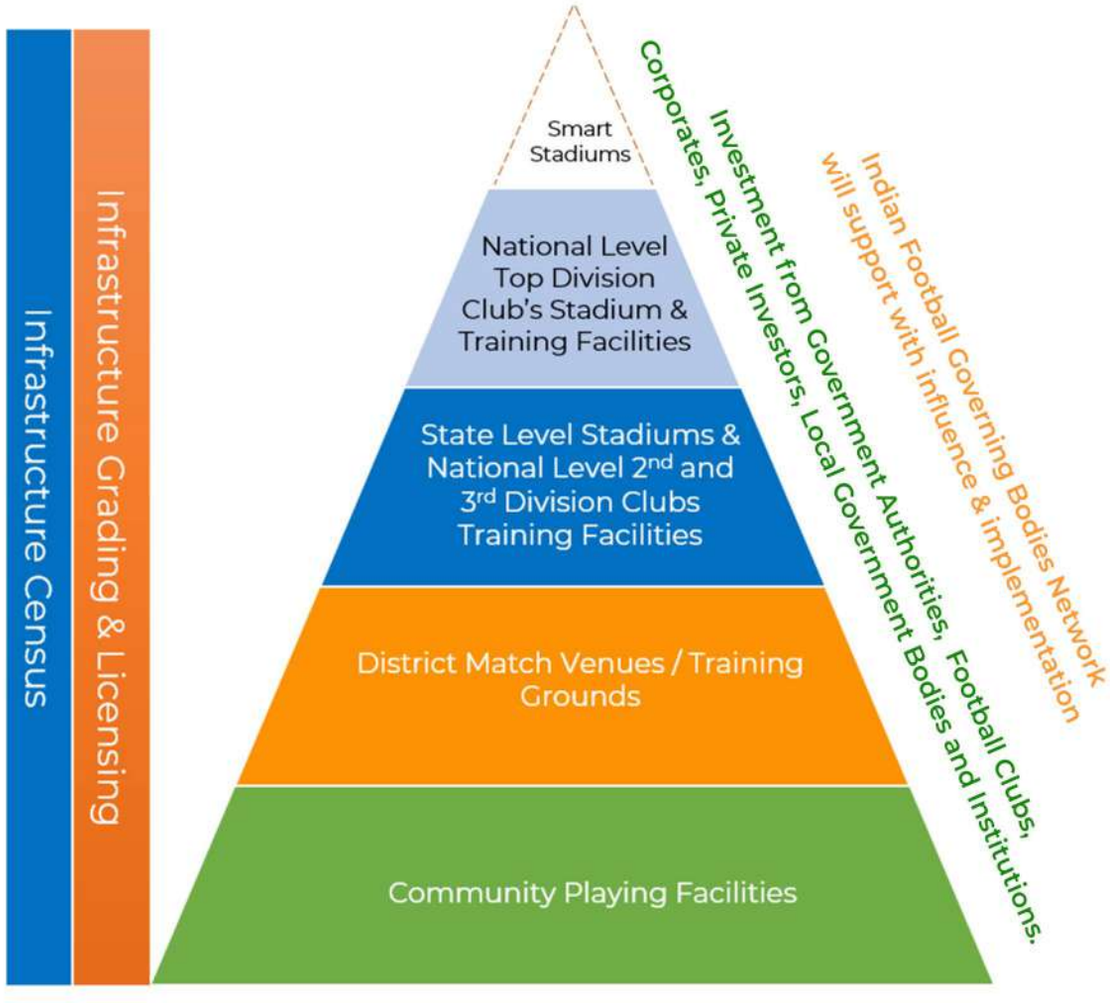
Our Observations

- Lack of adequate number of Full-Size Pitches
- Lack of world class football specific stadiums for organisation international competitions.
- With a rapid dwindling of free space in Urban areas over the past 2 decades, community playgrounds are slowly vanishing.
- Lack of infrastructure ownership across the Football Ecosystem including top professional clubs
- Majority of existing Infrastructure ownership lies with Governments and its affiliates
- Accessibility Issues around existing infrastructure pose varying challenges in different parts of the country
- The sustainability model of Clubs in India, leads to very low investment on building infrastructure with Football Infrastructure development not being an investment friendly proposition across the country
- Unavailability of a well-defined 'Infrastructure Grading & Licensing' framework leads to 'limited understanding around `existing infrastructure in place'

INFRASTRUCTURE

Our Objectives

- Infrastructure Grading and Licensing Criteria to be developed with a long-term focus coupled with an Infrastructure Census on regular intervals
- Liaison with Government Bodies to influence Policies and Guidelines supporting development of Football Infrastructure at National Level as well as Community Level.
- Partner with Facility owners for using their infrastructure to provide Competition and Match time for Youth
- Policies, Guidelines, and Licensing criteria ensuring relevant and right infrastructure across the club structure
- Ensure Professional Clubs to have their own training facilities
- State-wise customized infrastructure development plan
- Partnering with Government bodies to incentivize infrastructure investments through policy level interventions



INFRASTRUCTURE

TARGET 2026

- Policy interventions in place to incentivise infrastructure investments
- Infrastructure Grading & Licensing criteria in place by 2024
- 1 Smart stadium and 2 FIFA Standard stadium development plans
- Mega Football Park Plan to be formalised by 2026
- Infrastructure Census Pan-India to be completed by 2025
- Have a Fully Functional National Center of Excellence by 2026
- A women's NCE by 2026

VISION 2047

- Minimum 50 Standard Football pitches per district
- 30 FIFA Standard stadiums & 12 smart stadiums
- State of the Art football park for Indian Football
- 50 Professional Clubs to have their own training base

3 DIGITAL TRANSFORMATION

GOAL

Digitisation of every aspect of football and adopting new technologies to support the growth of football in line with our long-term goals.

DIGITAL TRANSFORMATION

Digital and technological adoption in the modern world are an integral part of every organization and sector. While some (i.e. Financial Services, Pharmaceutical sectors) have adopted digital at early stages of technological innovations, the sports sector has largely been a laggard in digital adoption across the world.

Developed countries are among top few, leading the race to embrace digital solutions in different aspects of Football to bring efficiency and excellence. Today, digitization is being used in Fan Engagement, Player Performance Management, and bringing all stakeholders together to promote collaboration and enhance operational efficiencies across the ecosystem.

Our Observations

- At Organization Level, While the AIFF has adopted digital solutions on multiple aspects, adoption of new age digital tools around workforce, processes, interactions, analytics is needed to be more efficient
- The Digital Aspects of current Football Ecosystem are not capable of managing information around all stakeholders in an efficient and continuous manner across lifecycle of stakeholder
- Limited use of digital around enabling the ecosystem, while no focus on using new technologies such as Machine Learning, Artificial Intelligence, Augmented Reality etc.

DIGITAL TRANSFORMATION

Our Objectives

One Platform for All

Football Management – All the stakeholders in the ecosystem (Individual as well as Institutional), Competitions, Events and any other Football Activity will be managed through this platform in collaboration with MAs and Partners

Providing Digital Pathway to Players across competition structure

One view of a player

- A snapshot that gives you everything about a player (top level), backed by advance analytics & information management
- Will be base to scouting players

Digitally Transforming - The Organization

People – Interactions, Collaboration, Information Management, Enhanced People Experiences

Process – Transparent, Efficient, Data Maintenance & Hence, Analysis, Hence, Feedback Mechanisms in place for continuous improvement

Technology – A complete technological overhaul, in the direction of our long-term vision

For Rest of the Ecosystem

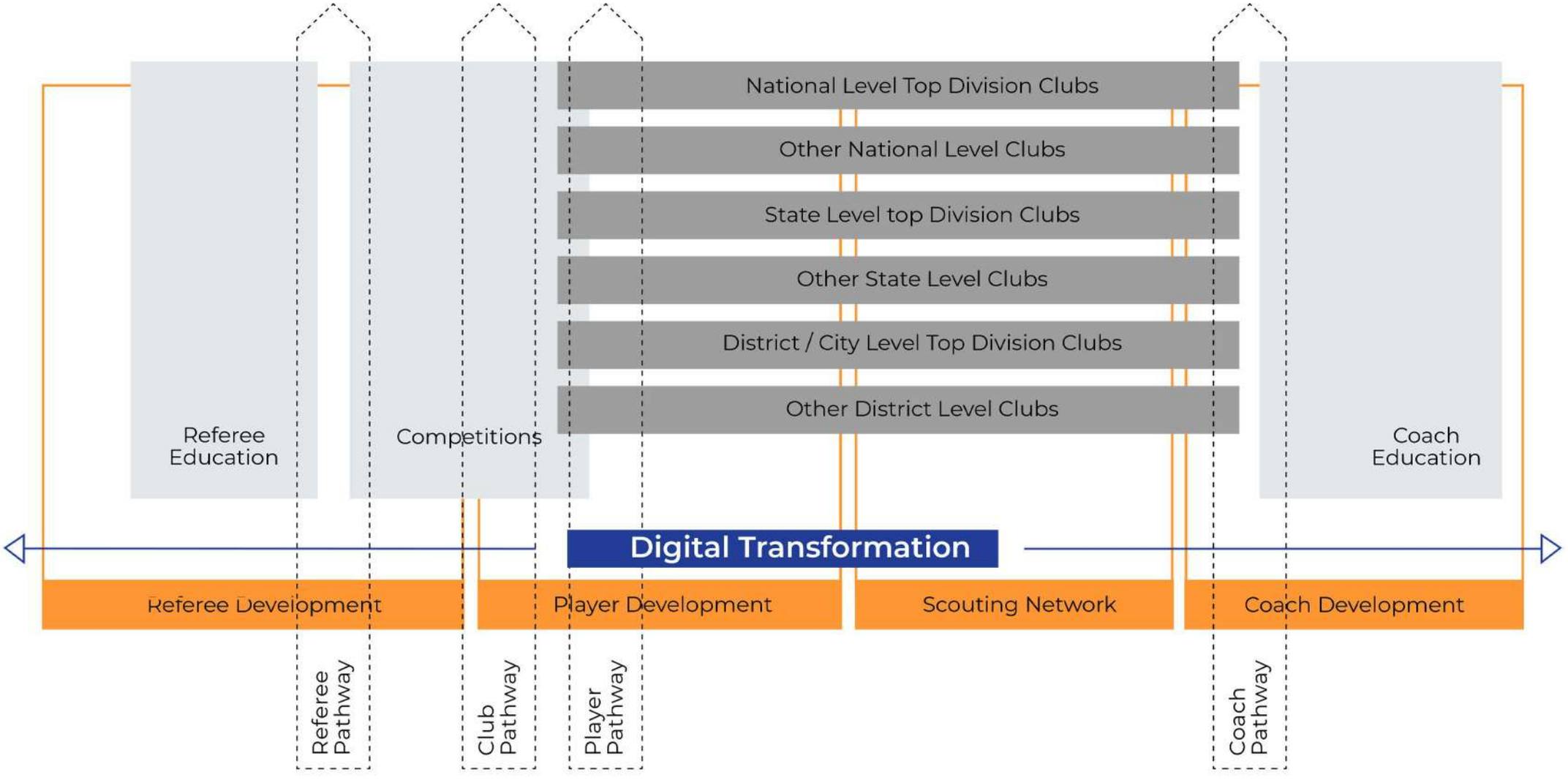
We will create more **digital channels & properties** to cater to the needs of our Stakeholders

- For Fan Engagement
- Information Distribution
- Video Streaming / Live TV
- E-football etc.

Data Management and Analytics

DIGITAL TRANSFORMATION

Structured Football Ecosystem



DIGITAL TRANSFORMATION

TARGET 2026

- Setting up an 'Innovation Hub' in collaboration with technology partners
- Release first version of the football application catering to all stakeholders
- Analytics in Scouting at Elite Level – Design, develop and implement first version of analytical tool for scouting at elite level
- Pilot two to three concepts around creation of more revenue streams through digital
- Design and develop a streaming platform to offer football content of all levels to fans
- Creation of a centralized data lake & footage archive for both technical development and stakeholder communication

VISION 2047

- All processes, people, institutions, and other stakeholders to be on one digital platform having personalized experiences backed by advance analytics
- Data analytics in every aspect of ecosystem from making processes better to finding the right talent
- Create a Digital Library of content for Fans
- Specific Tools and Digital Applications in place for measuring and managing Elite Player Performance
- Greater adoption of technologies like Artificial Intelligence, Machine Learning, and exploring possibilities of utilizing the Metaverse and E-Sports for engaging and capturing a new audience for Indian

4 REFEREEING

GOAL

Produce enough competent referees to support our growing Competition Structure with a sharp focus on developing excellence for them to be consistently officiating Global Level matches.

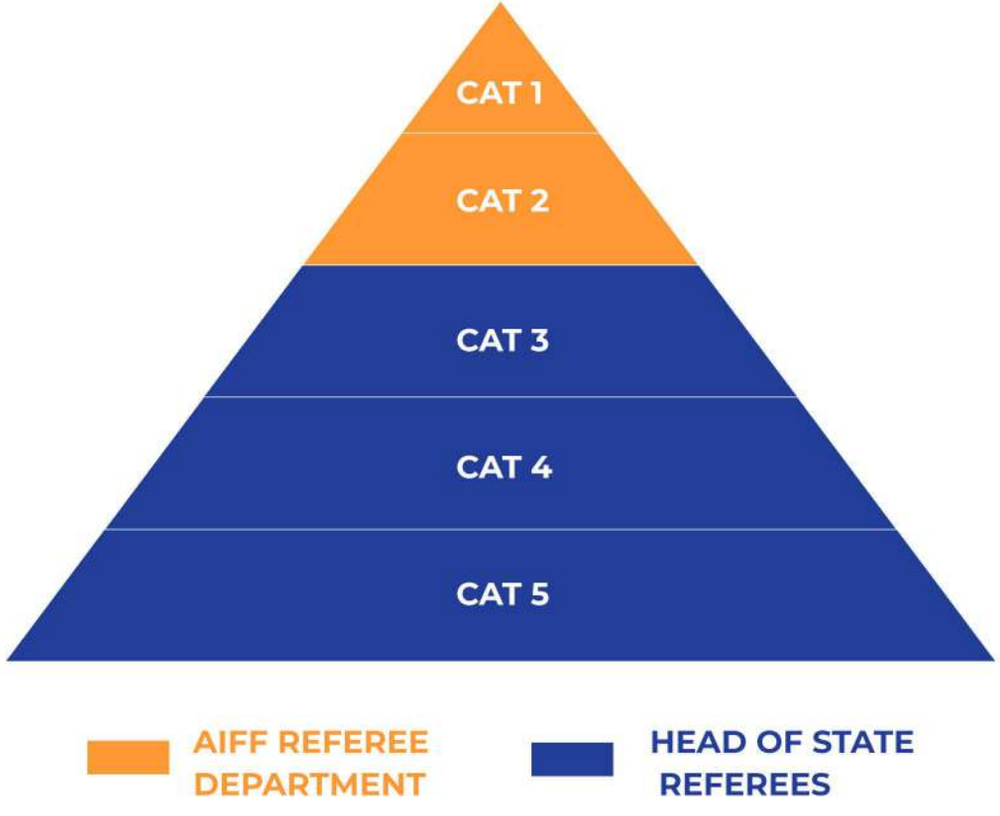
REFEREEING

Refereeing as a profession has changed drastically over the past decade with the introduction of technologies such as Goal Line Technology and Video Assistant Referee to name a few of the new advancements in this area. With multiple replays from different angles, and real time on demand analysis match officials are under greater scrutiny than ever before.

However, across the world, even today refereeing is not a financially sustainable career until one makes it to the top of the pyramid.

Our Observations

- Insufficient number of games at Elite level to develop referees professionally
- No formal assessment and promotion schemes from CAT5 to CAT3
- No dedicating coaching support for Elite match officials
- No accelerated promotion for talented individuals
- Not enough sustainable livelihood opportunities in existing ecosystem, leading to Refereeing being not chosen as full time profession
- Significant scope of improvement in Quality of refereeing

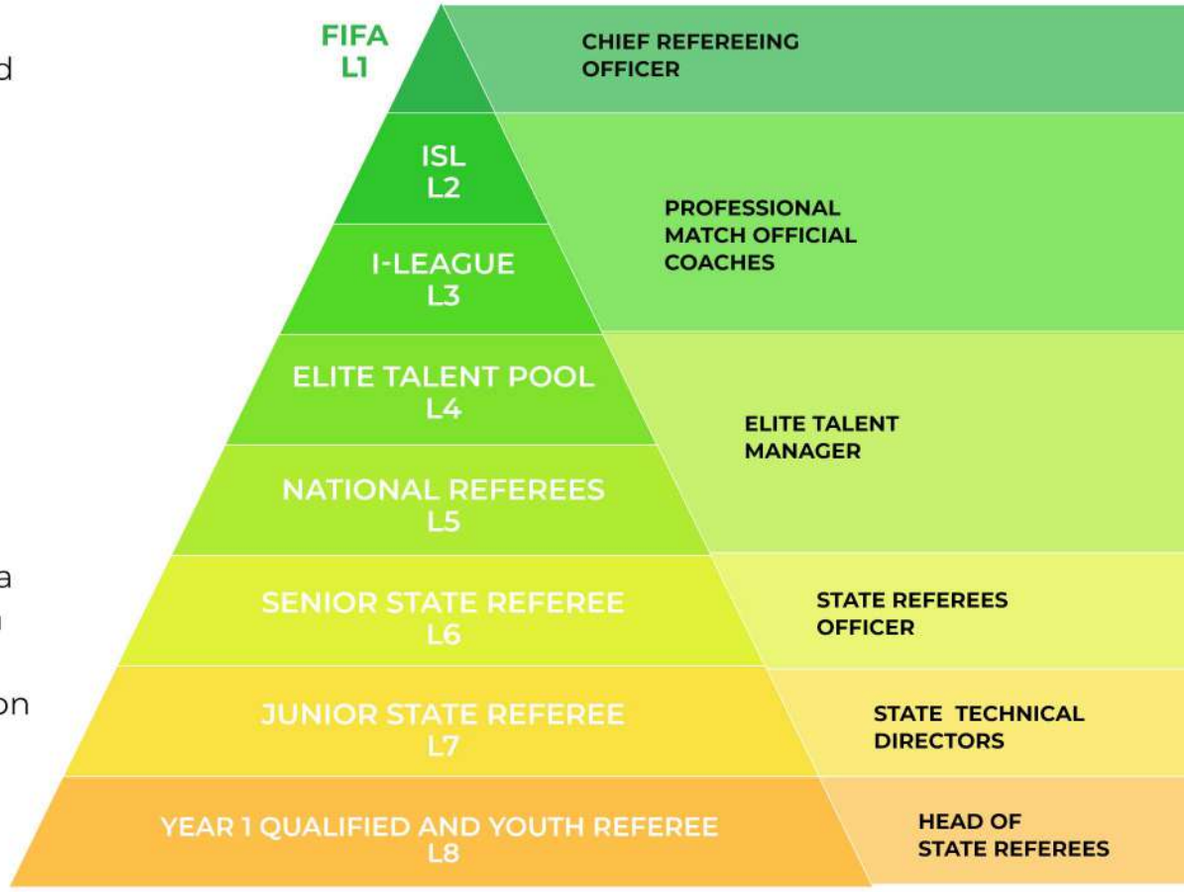


REFEREEING

Our Objectives

- Encourage & Incentivize full time professional careers in Refereeing amongst Elite match officials
- Recruit and retain referees with the MAs to support the expected growth in Indian football in both the men's and women's games
- Strive for the introduction of technology into the professional game
- Ensure refereeing numbers at each level guarantee a minimum of 20 games within the core officiating role
- Develop an AIFF accreditation scheme for assessors and instructors allowing MAs to become self-sufficient
- Establish Centre of Refereeing Excellence and Establish a National Referee Academy with links to sports academia
- Develop and train women referees to allow full integration into the men's game
- Attract younger talent through the Junior referee programmes alongside a transparent and accelerated promotion scheme to allow match officials to be nominated for FIFA by the age of 25 years

Active Match Officials- Men & Women



REFEREEING

TARGET 2026

Accredited Referee Assessor and Instructor Scheme
Dual Role - 2026

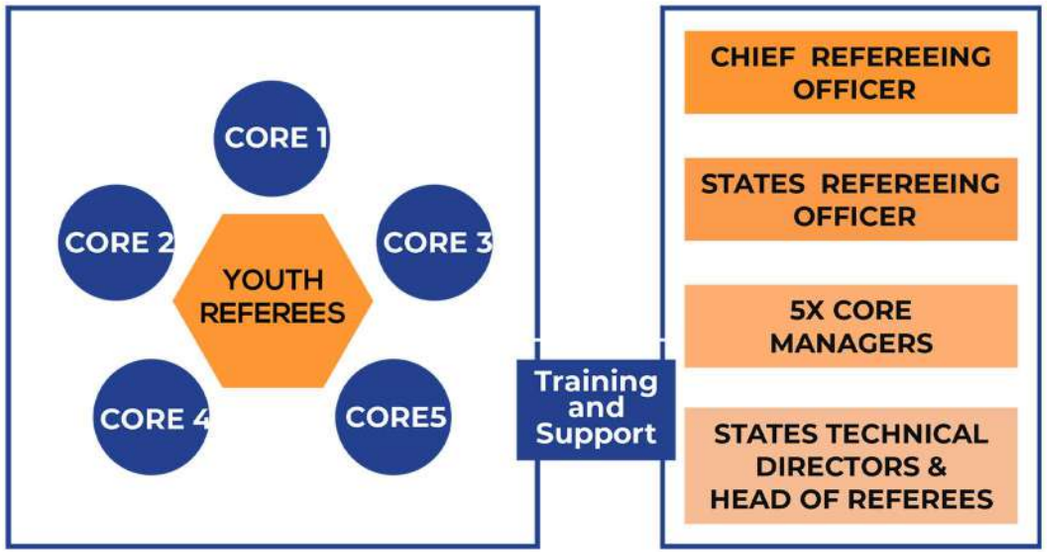
	Assessors	Target 2027	Instructors	Target 2027
A Grade (FIFA /AFC)	6	8	6	8
B Grade (National)	36	70	36	55
C Grade (Senior State)	25	80	25	50
D Grade (Junior State)	20	100	20	50

REFEREEING

TARGET 2026

Elite Referee Talent Identification - 2026

CORE - Center of Refereeing Excellence



- 5 CORE centres to train youth referees
- Training and support from the AIFF & States
- Identification of elite talent and fast tracking of candidates for talent contracts

REFEREEING

VISION 2047

- Indian match officials to attain global excellence and seen to be officiating at Global competitions including senior FIFA World Cups
- Every State to be self-sufficient with AIFF accredited assessors and instructors
- Recognized refereeing career pathway for the youth and elite talent of tomorrow
- Women referees operating at the highest level of Indian football
- Having adequate number of competent referees at all levels to support the entire competition pyramid

5 CLUBS

GOAL

To empower clubs to be focal point of ‘Talent Development’ to grow the competitive level of football.

CLUBS

The quality of the clubs and the player pathway offered by the clubs is decisive in the development of football in any country. A vast talent identification network linked to clubs across the pyramid creates the net required to effectively induct the best talent into the formal football structure. Once identified, these talents are groomed and eventually follow their pathway up the pyramid through the club competition system.

Grassroots activations and subsequent hyperlocal growth of the sport is driven by clubs and academies. With a deeper connect to its immediate local communities, clubs often lead the charge of harnessing football to impart social change.

Our Observations

- Most of the National Level Club don't have a 'Elite Talent Development Structure' in place
- Investing in Football Clubs is not viewed as an attractive business model in India
- Unscientific Scouting and Talent Development
- Low club to population ratio in most areas
- Low adoption levels of Women's Football by existing clubs across the pyramid
- Negligible level of constant activities in grassroots development at a club level
- Barring a few, most clubs lack consorted efforts and results on Fan Development and Engagement
- Majority of expenses are for first team hinting at a very short-term outlook, insufficient investment on creating infrastructure, youth development, and scouting structure

CLUBS

Our Objectives

- Supporting clubs to maximize existing revenue streams and develop additional revenue generation possibilities
- A policy & regulatory framework incentivizing the efforts put by them in Talent Identification and Development with Financial benefits
- Programs targeting incubation of 'Developmental Clubs' across India
- Incentivizing clubs to adopt and promote women football across the pyramid
- Collaborating with clubs and local governing bodies to promote grassroots football
- Support clubs with Fan engagement activities to drive the growth of football at grassroots level

CLUBS

TARGET 2026

- Club licensing to make it mandatory to have a 'elite player development program'
- At least 20% of the clubs to have residential academies for player development
- All clubs to have a defined scouting structure in place
- Have youth team for all the top professional clubs

VISION 2047

- Competitive structure involving 20K clubs
- 50% of 'Developmental Clubs' to have a Women's Football Division
- 100 Professional Clubs in the 'Top League Structure'
- Minimum 20 standalone Women's Football Clubs
- At least one club amongst top four in Asia AFC Club Competition champion by 2037

6 GRASSROOTS

GOAL

To drive maximum participation at grassroots in collaboration with stakeholders.

GRASSROOTS

Greater participation at grassroots increases the possibility of identifying elite talent at an early age. The wider the base & greater the participation, the greater the strength of the pyramid. In most developed football ecosystems, Governments invest hugely into grassroots as a means of engaging communities. With substantial public health and socio-economic benefits from investments in Grassroots sports they end up driving both participation and infrastructure investments through tailored policies and programs.

Accessibility to local football facilities, socio cultural factors alongside the popularity of the sport in a country has proven to be the most important factor for adoption of the sport globally. Club football is the leading access route globally for boy's football followed by school football, female only competitions are the most prevalent access route for girls with mixed football a close second.

Our Observations

- Baby leagues are currently the only concrete initiative targeting grassroots from an organized central level
- Relatively low participation numbers with respect to India’s size and population
- Irregular level of formal activities with a short engagement periods
- Large Gender disparities in Participation levels of Boys and Girls
- Lack of urban community football facilities
- Not enough trained personnel involved in grassroots football
- Spontaneous participation is limited to certain regions where football is the amongst the top 3 sports of choice
- Significant Funding gaps owing to a lack of focus from most stakeholders
- Lack of defined pathway between grassroots football and the Youth Structure
- Lack of cohesion between different stakeholders
- North-Eastern states are an exception where Football remains the sport of choice

GRASSROOTS

Our Objectives

- Defining “age appropriate” bundle of activities, that can be done to promote Grassroots
- Build Capacity around Member Associations and its affiliated units for Grassroots development and implementation of training solidarity
- The Federation will Influence, Promote, Regulate, Support, and build mechanisms to track our growth in Grassroots
- Identification and Implementation of Pan India initiatives through support of Our Partners, Ecosystem Stakeholders, AFC and FIFA
- Liasing with different Government organizations to invest in grassroots
- Build attractive propositions for Corporate Houses to invest into grassroots as well as CSR projects
- To ensure Implementation of Transition Programs across Districts through Clubs
- Using influencers and prominent personalities to promote grassroots
- Playground for kids – Influence creation of playgrounds in close neighborhoods to increase “accessibility of playing facilities” for kids at grassroots
- ‘Grassroots League’, ‘Football for School’, and ‘Village Grassroots Programs’ ‘Rural & Tribal development projects’ tailored to target Schools alongside Urban, Rural areas
- Positioning football at the Grassroots as a vehicle for social good and engaging youth for holistic development & female centric targeted grassroots projects

GRASSROOTS

TARGET 2026

- Launch of Flagship Grassroots Project
- Reach 35 Million Kids through grassroots programmes
  - Implementation of Village grassroots programmes in 100 Villages
  - Tribal area grassroots initiative launched in 10 districts
  - 25 Million Kids covered through Football For Schools
- 1 Million Registered Players
- Launch Nationwide Fans & Volunteer Programme
- 100K trained School PE teachers
- Elite Grassroots Development Coaching Modules and Courses Launched

VISION 2047

- Football to be the sport with highest participation numbers with a target to engage more than 100 Million Children into the sport
- Have a robust grassroots structure from villages to the National Level with a vibrant and inspiring participation culture across the country
- Have the capacity within our stakeholders to organise, administer and attract funding for a wide range of grassroots initiatives
- Adequate community level playing facilities across the country in both Urban and Rural spaces

7 TALENT DEVELOPMENT & IDENTIFICATION

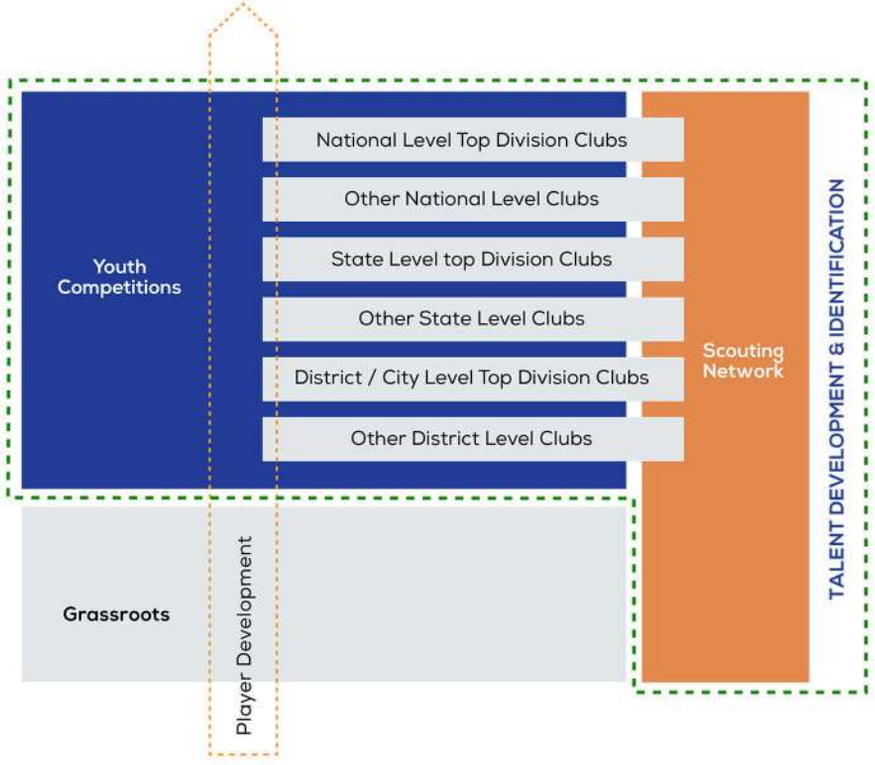
GOAL

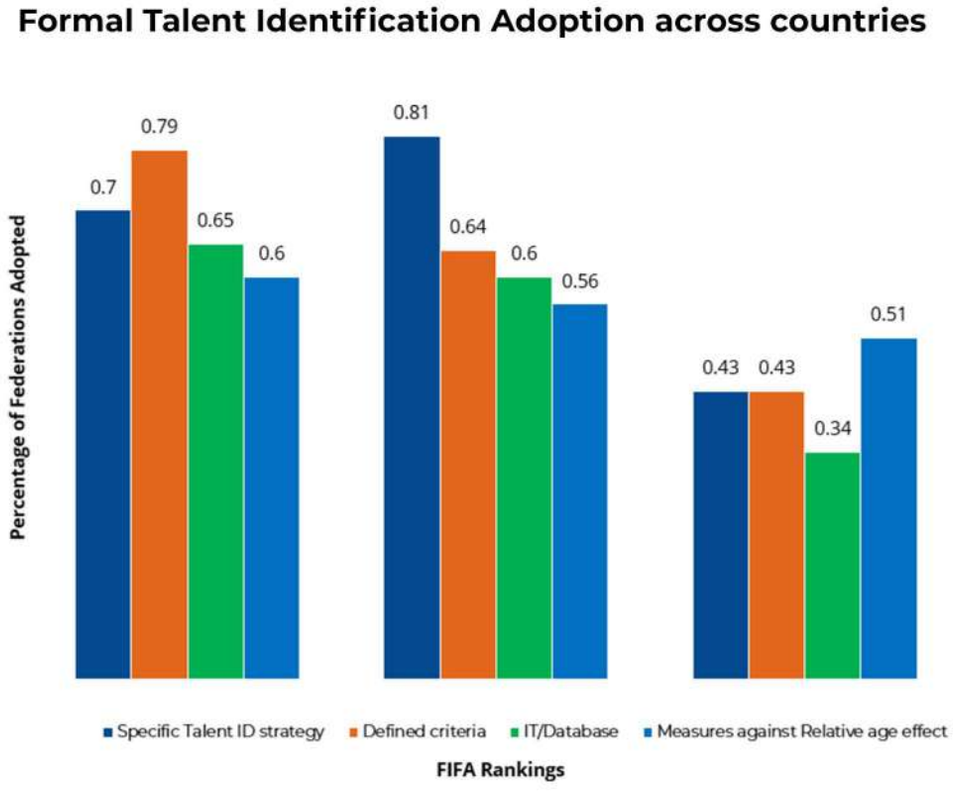
Ensuring every talent gets a chance to be inducted into the formal football structure that consistently produce players of Global Competitive Level through a conducive ecosystem design.

TALENT DEVELOPMENT & IDENTIFICATION

Club and academies are the dominant key stakeholders in player identification and development in most of the top 100 ranked countries. However, setting a clear direction through a formal talent identification strategy in line with the overall 'National Football Philosophy' helps shape characteristics of the talent pool.

A systematic approach that is data driven, has defined criteria for player selection and measures to deal with relative age effect has significant impact on the effectiveness of a country's ability to spot players with strong natural ability. More than 80% of the top 1-20 ranked countries have adopted a systematic approach to talent identification a number that progressively drops off to around 35% in the 51-100 ranked bracket.



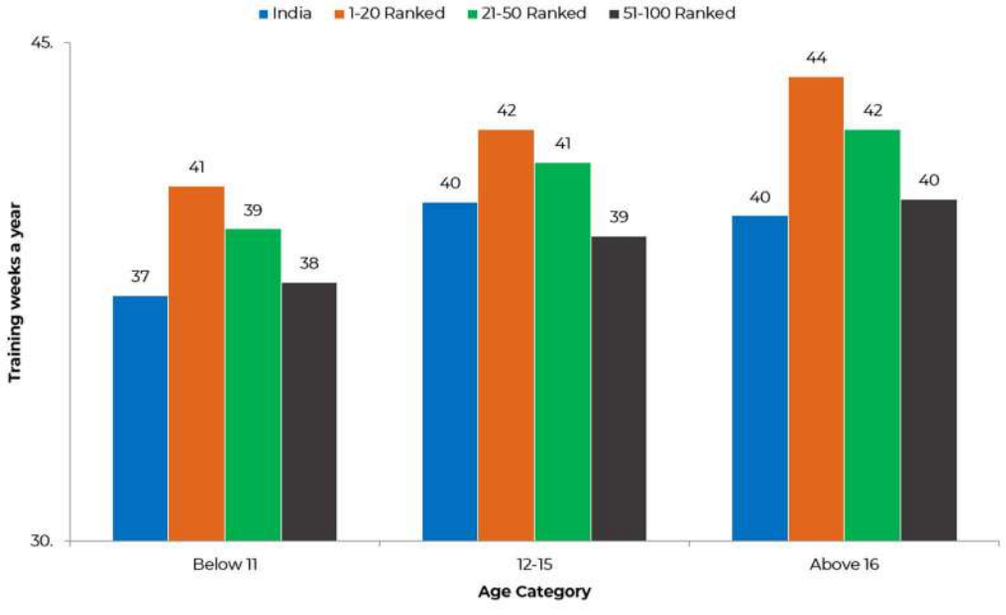


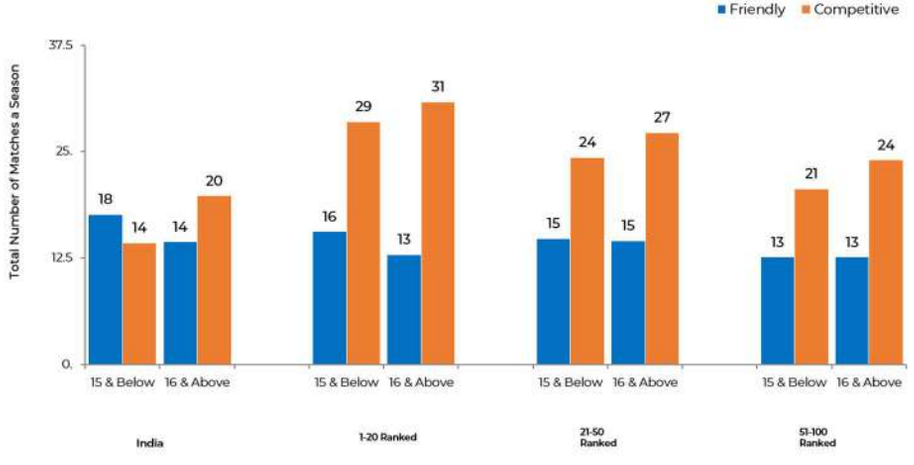
TALENT DEVELOPMENT & IDENTIFICATION

Our Observations

- Informal personnel driven scouting network prevalent across pyramid
- Ecosystem is largely informal where clubs and federation bodies are all largely working in silos without a systematic or uniform approach
- Decent spurt in private academy infrastructure across the country leading to a gradual growth of the Youth talent pool in the formal infrastructure
- Scarcity of modern scouting education across the country
- Low number of specialized coaches or elite coaches working in the Youth/Grassroots levels
- While training hours are largely on par with global standards, a significant gap remains when it comes to competitive games across the year
- Large gap in facilities between Elite and non-Elite Youth Setups
- Weak competitive structures for youth football
- Lack of a focused approach from clubs in identifying talent and developing elite players
- Most Elite Talent Concentrated in only a select few States of the county leading to a lack of capitalization of the population dividend

Elite Academy Setup - Training weeks





TALENT DEVELOPMENT & IDENTIFICATION

STATES WITH THE MOST MALE PLAYERS IN TOP NATIONAL LEAGUES			
State	**Hero ISL**	**Hero I-League**	**Total**
Manipur	38	65	103
Mizoram	26	43	69
West Bengal	24	26	50
Kerala	18	27	45
Goa	23	22	45
Punjab	27	16	43
Maharashtra	15	25	40
Tamil Nadu	8	8	16
Meghalaya	4	11	15
Delhi	6	9	15

STATES WITH THE MOST FEMALE PLAYERS IN TOP NATIONAL LEAGUE	
State	**Players in IWL**
Manipur	60
Odisha	59
Haryana	33
Maharashtra	29
Chhattisgarh	27
Assam	24
Tamil Nadu	23
Delhi	17
Mizoram	10
Goa	9

TALENT DEVELOPMENT & IDENTIFICATION

Our Objectives

- Make the clubs a focal point for talent identification and drive talent development at a grassroots & youth level
- AIFF to build capacity of the clubs in strengthening the talent identification and development process
- Create a calendar that maximizes competitive games across age categories and lengthens the engagement period
- Clearly defined areas of scouting for AIFF and Clubs through the competitions pyramid
- Further incentivize infrastructure investments by clubs and private academies and attract investments into new elite facilities for youth football
- Develop a competition structure striking a balance between
  - Inclusivity based on sporting merit & incentivizing investments in elite infrastructure
  - Longer competitive engagement period & breaks for educational commitments
  - Higher number of competitive games through the year & logistical challenges of travelling across age categories
- Maximize talent pool from existing hotspots and build new talent hubs across the country
- Conceptualisation and Initiation of Project Diamond
- Rural and Tribal Talent development projects

Talent Identification Structure - Youth Teams

AIFF to setup a data driven scouting structure from the Elite Youth League System for its

Clubs to drive talent identification at grassroots unto the Elite Youth structure

TALENT DEVELOPMENT & IDENTIFICATION

India to become the talent export hub for world

TALENT IDENTIFICATION & DEVELOPMENT

TARGET 2026

- Data Driven AIFF Scouting for Youth National Teams
- 35 matches per youth player across elite and state youth leagues
- Design and implement “Academy Licensing Criteria”
- 5000 licensed scouts in India
- 100 teams in each Elite Youth League Category
- Achieve a total talent pool of 100k registered players in youth categories

VISION 2047

- India to be one of the major hubs for football talent in the world
- At least one iconic player with International Stardom in both Men and Women’s Football

8 COACH EDUCATION

GOAL

Build a policy and framework which is consistent with the national football philosophy to make India self reliant in meeting the coaching manpower of global excellence to meet demands at all levels.

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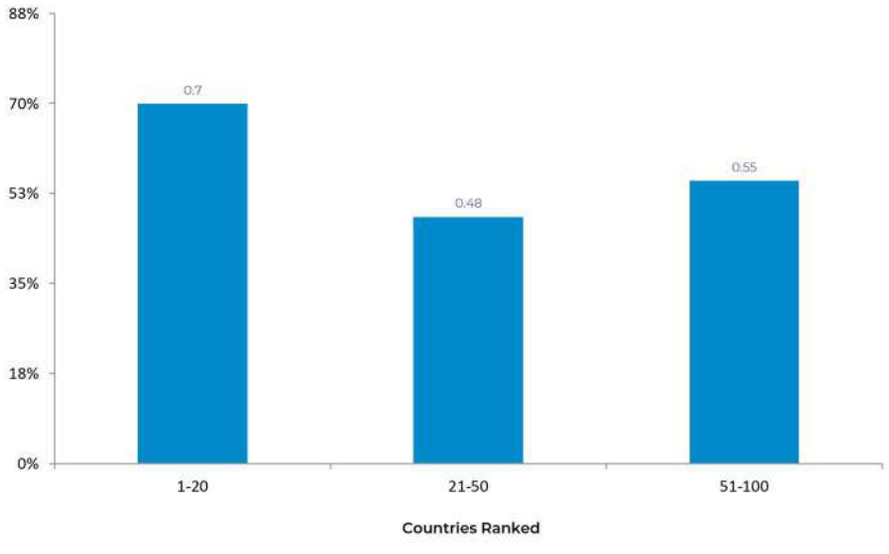
COACH EDUCATION

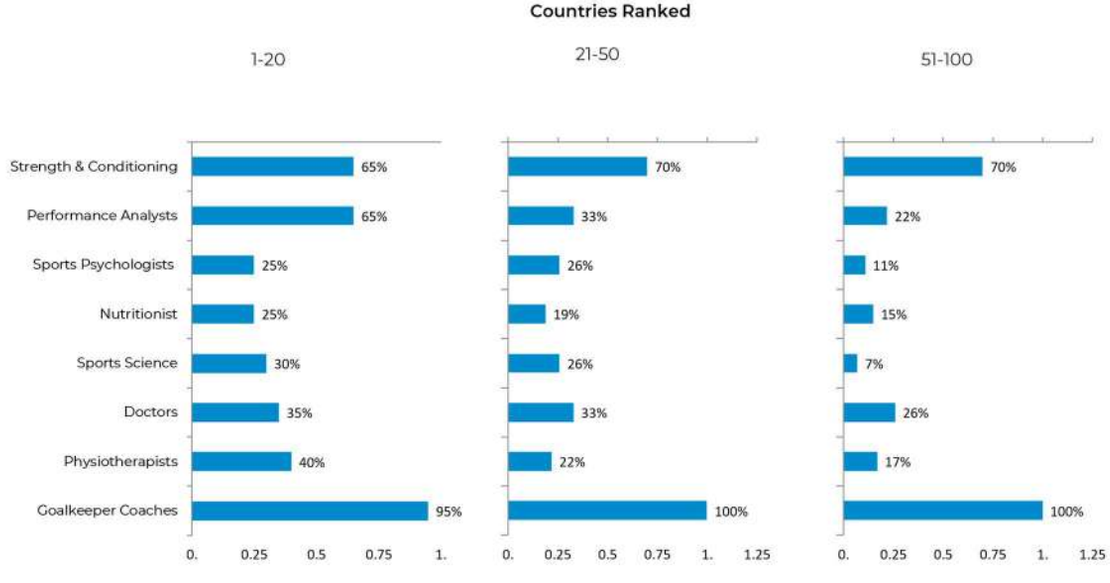
In an ever evolving modern coaching landscape, a significant amount of elite methodology is research based. No single curriculum or institution can provide all the necessary tools to build a state of the art coach education framework. A collaborative approach beyond traditional football licensing benchmarks across disciplines and a continuous learning environment is crucial to holistic coach development.

A comprehensive talent identification network coupled with a definitive development pathway with a overarching 'national football philosophy' embedded within the curriculum would enable the synchronization of the football community across varying levels of ability.

National Football Philosophy Embedded in Coaching Curriculum



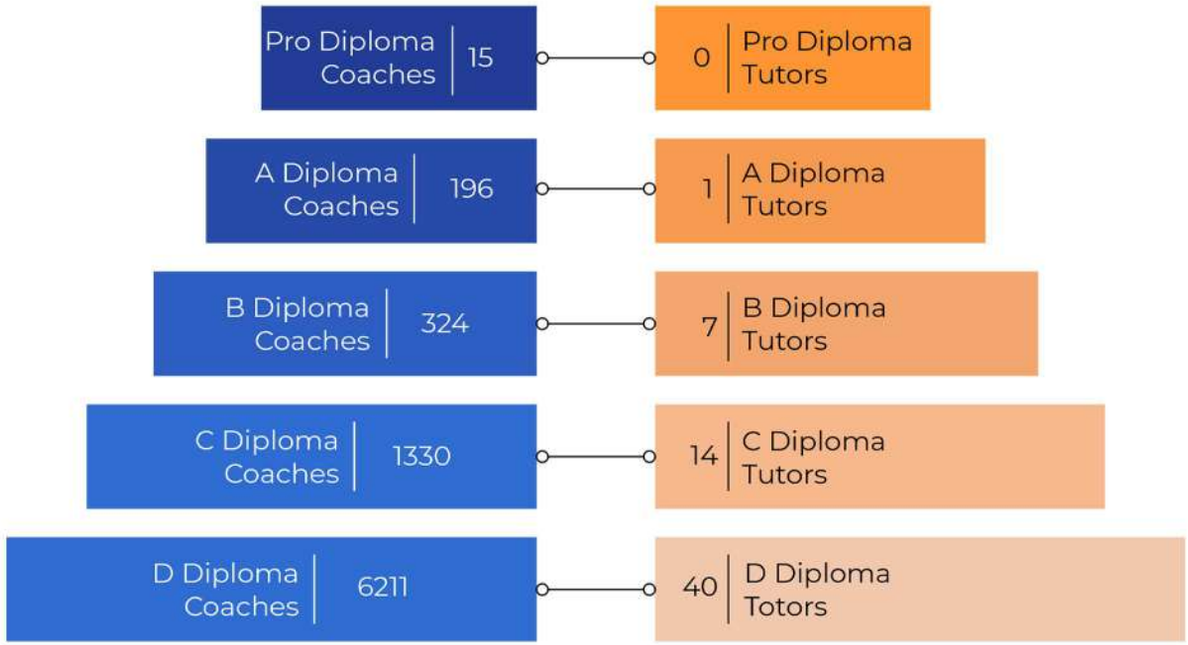
Specialised Coaching Courses Offered



COACH EDUCATION

Our Observations

- Significant scope of improvement in Coach Education Program Structure
- Number of coaches compared to our population significantly below global benchmarks
- There is a dearth of quality coach educators (A,B,C License)
- Absence of a 'National Playing Philosophy' leading to a lack of synchronization in coach education
- Geographical and Language barriers hindering scalability of coaching programs
- Low levels of current economic return creating a hindrance to career adoption across levels



Countries Ranked

	India	1-20	21-50	51-100
Average Population	1,38,00,04,385	6,22,88,806	3,92,04,229	4,34,93,882
Active licensed coach per 10,000 population	0.06	4.67	3.82	0.71
Active licensed Coaches	8,076	29,064	14,980	3,109

COACH EDUCATION

Our Objectives

- Creation of robust 'Coach Education Program' through specialized programs
- Strengthening the Coach Educator pipeline to increase volume and reach
- Improved accessibility through regional language curriculum delivery
- Collaboration with Education Institutions for providing 'Coaching Courses'
- Embedding of 'National Football Philosophy' within curriculum
- State of the Art football education framework through a dedicated technical lead in each state and continuous professional development

Diversified pathways will be introduced around the existing 'Coach Education Programs'

The 'Coach Education Program' structure will be explored and developed in line with our **'Indian National Football Philosophy'**

COACH EDUCATION

TARGET 2026

	Tutors	Target 2026	Coaches	Target 2026
Pro Diploma	0	1	17	72
A Diploma	1	5	201	565
B Diploma	7	13	326	839
C Diploma	14	28	1433	3023
D Diploma	40	100	6185	21142
E Diploma/Grassroots	58	200	324	25000

50 K Active Coaches by 2026

COACH EDUCATION

VISION 2047

- 350k active coaches across all levels
- Each State to have instructors of every level
- Self reliant with globally competitive coaches for every level
- Attain leadership status in coach education with a research based learning curriculum

9 COMPETITIONS

GOAL

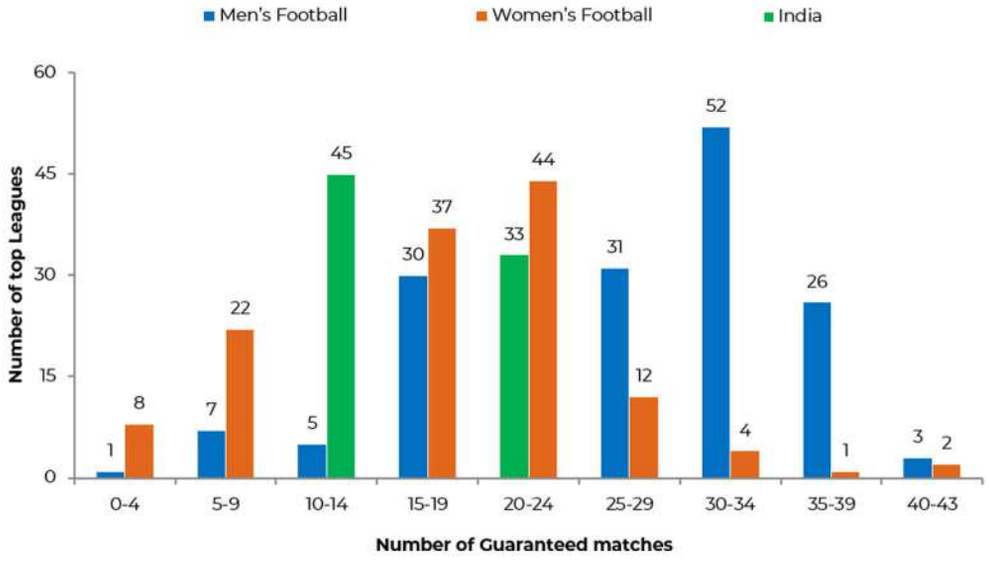
Robust competition structure covering the entire football pyramid with competitions being at the centre of football development.

COMPETITIONS

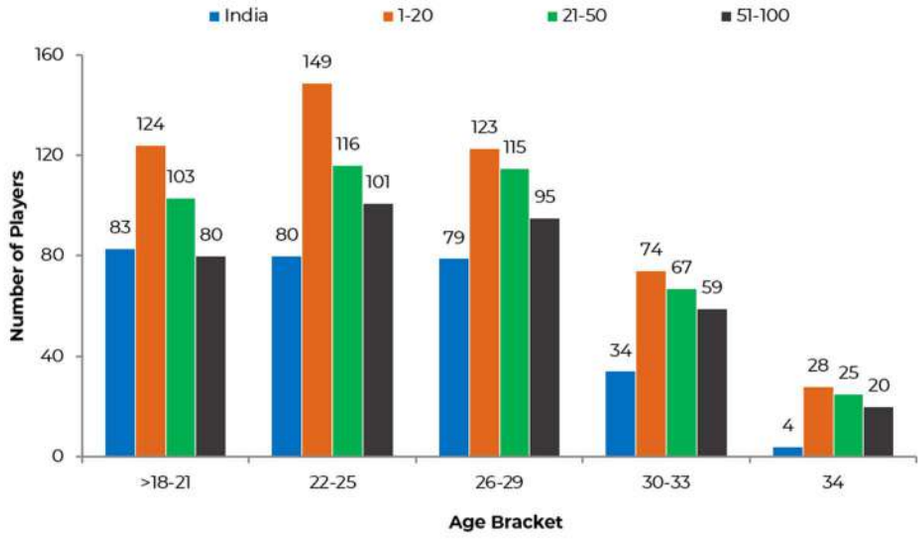
There is a direct correlation between the level of a country's national team performance and the number of teams in the top tier league of the respective country. While the average number of teams for the Men's game in countries ranked between 51-100 is 14.6 it steadily rises to 16.5 and 17.6 for the top 21-50 and 1-20 respectively. While the gap is lower for the Women's football it still rises from 10.3 in the 51-100 category to 11.3 in the top 20.

Countries with more clubs competing in a longer league are able to offer more professional slots in the top tier, widening the talent pool as well as offering a bigger opportunity of crucial playing minutes to younger players. Both of these are key to the effective transitioning of developmental players into senior football.

Number of guaranteed matches in the top division League



Age breakup of players in top tier football



COMPETITIONS

Competition - Senior Men

EXISTING STRUCTURE (SENIOR MEN)

- ISL (11 teams)
- I League (11 teams)
- I League 2nd Division (18-20 teams)
- State Top Division (20-25 leagues)
- State 2nd Division (NEGLIGIBLE)
- State 3rd Division (NEGLIGIBLE)
- District Top Division (40-46 leagues)
- District 2nd Division (NEGLIGIBLE)
- District 3rd Division (NEGLIGIBLE)

Club Pathway

Our Observations

- At national level, though we have three levels of competitions for clubs. It is still an evolving league structure with only 23 consistent slots with an average of 20 games a season.
- Out of 36 Member Associations, 25 conduct State Top Division, with a low number of matches within a limited period of time
- Low volume of competitions at State and District level

Our Objectives

- Increase competitive level and developmental impact of existing leagues
  - By increasing number of teams
  - By strengthening the youth pipeline
- Lengthen the competition pyramid with a clear club progression pathway
- More competitions at state and district level
- To make 'Senior Men League Structure' a 4 Tier Structure at the National level by the end of 2026

COMPETITIONS

Competition - Senior Women

EXISTING STRUCTURE (SENIOR WOMEN)

Our Observations

- The top division of National 'Senior Women', lacks firm structure with the IWL, started in year 2016-17 with 11 teams more of a yearly tournament format
- The teams for IWL are top teams from different State Women's Leagues leading to a lack of continuity of clubs playing in the competition
- A wide variance in quality of State Leagues, only 11 conduct state leagues and there is a good difference in 'Number of Matches' as well as the 'Level of Matches' a player gets in those leagues
- Currently an average player gets an average of 12 -18 matches a season

Our Objectives

- Increase number of competitive matches at National and State Levels
- Increase 'number of states' conducting Women's Leagues
- By the end of 2026, make 'Women League Structure' a Four Tier Structure from State to the National level

COMPETITIONS

Competition - Youth Men

EXISTING STRUCTURE (YOUTH MEN)

National Men Youth League for
U18 (75 – 80 teams)
U15 (75-80 teams)
U13 (60-70 teams)

State Men Youth Leagues
(NEGLIGIBLE)

District Men Youth Leagues
(NEGLIGIBLE)

Club Pathway

Our Observations

- While India did have inter state youth level competitions through NFCs, the concept of national level youth leagues is relatively nascent, only having started after 2015 and have competitions at the U13,15 and U18 Level
- The last few years has seen an increase in Number of Youth Teams in all age groups but with respect to our population, we still have a massive scope for increasing participation
- A team gets on an average of 8 to 14 matches based on their qualification to next stages of the tournaments, which are substantially lower than global standards
- Logistical costs around Traveling, Food and Lodging for Home-Away concept are high for clubs and cause a hindrance to an elongated youth league structures at a National level. Hyper localisation on the other hand creates large disparities in competitive levels between Elite Youth teams and the rest
- A gap of 3 years between U13 an U18 level is too wide, moreover there is a lack in successful transition of Youth players into Senior Football between the 17-20 age group

COMPETITIONS

Competition - Youth Men

EXISTING STRUCTURE (YOUTH MEN)

National Men Youth League for
U18 (75 – 80 teams)
U15 (75-80 teams)
U13 (60-70 teams)

State Men Youth Leagues
(NEGLIGIBLE)

District Men Youth Leagues
(NEGLIGIBLE)

Club Pathway

Our Objectives

- Strengthen National Youth Leagues by
  - Increasing duration of Engagement through the Calendar year
  - Increasing the number of competitive games at each age category
  - Increasing the level of competitions across all age categories
- Introduction of an U19 Youth League to aid transitioning of Elite Youth players into senior Football
- Drive the parallel implementation of Youth Leagues at State levels across U13,15,17 through respective member associations to provide additional competitions at a Local level as well
- Incentivise existing clubs and academies to invest in youth facilities through direct entry into elite youth leagues through Academy Licensing.
- Create a pathway for sporting excellence and provide a platform to Champion youth teams from the states to compete at the National Level Elite Youth Leagues in the subsequent year

COMPETITIONS

Competition - Youth Women

EXISTING STRUCTURE (YOUTH WOMEN)

National Women Youth League - U17

State Women Youth Leagues (NEGLIGIBLE)

District Women Youth Leagues (NEGLIGIBLE)

Club Pathway

Our Observations

- Multiple short city level leagues at the State Level through Khelo India Initiative, for U17 age group
- Sporadic tournaments with a short engagement duration, lack of consistent competition calendar and defined player pathway
- Most of these players get only 10 to 14 matches every year
- While the competitive level of Indian Women's Football is higher at an international level in comparison to our Men's game the ecosystem at a domestic level is significantly weaker, especially at the youth level

Our Objectives

- Include more age groups and add U13 and U15 on a hyperlocal level to encourage participation and grow the talent pool
- Increase number of team in a city on year-on-year basis to increase competitiveness of league and provide adequate number of matches to each player
- Introduce the Women's game at a youth level to more states

COMPETITIONS

National Football Championships (NFCs)

Current State

- National Football Championships are one of the Marquee tournament played across three age groups for Men and Women.
- In this tournament, our Member Associations prepare teams representing their States
- Though it is one of the top tournament, but there are no focused efforts put in place to attract sponsors around this property
- Not all state governments have shown support in conducting tournaments and helping us reduce our some of the expense elements
- From the participation perspective, Men competition enjoy a fairly high participation rate with more than 90% of states participating in tournament
- Women's competition lacks good participation for youth categories, where we see only 62% to 75% states participating in the tournament

Objectives

- Strive to raise the competitive level of the competitions by making it a scouting platform for Elite League clubs
- Rebrand and Revive the Hero Santosh Trophy as the pinnacle of Indian Amateur football
- Decentralize and Empower states to drive the growth of NFCs
- Strive to ensure competitive participation from each state in every category of NFCs
- Assess the Introduction NFCs at the Under 21 and Under 19 Levels
  Initiation of the National Football Games Concept

COMPETITIONS

Futsal

Current State

- Sporadic adoption across certain pockets in India
- A lack of any dedicated Futsal Facilities in the country
- A National Level Championship tournament has been recently introduced for clubs
- No competition is conducted at state and District Level
- No competition for Women ay any level

Objectives

- To make it an integral part of Football Development
- To change the existing club competition to a proper league structure
- Increase commercial value of Futsal Properties
- 75% of states will have Futsal Championship
- 50% of states will have women Futsal Championship
- National Futsal Championships to be introduced for Men as well Women

COMPETITIONS

Beach Soccer

Current State

- While football is widely played in the costal areas and recreationally on beaches, the sport of Beach Soccer is almost non existent
- This year A National Beach Soccer Championships for Men is introduced, and we have seen participation from 20 State Teams

Objectives

- To create a Competitive Structure for Beach Soccer by 2027
- 70% of states will have Beach Soccer Team for Men
- 40% of states will have Beach Soccer Team for Women
- Make 'Beach Soccer National Championships' a marquee property delivering good value to our sponsors

e-Football

Current State

- A domestic tournament for India has been held over the last 2 years by the AIFF apart from one season of an E-ISL linked to the Hero ISL Clubs
- The winners of domestic competition alongside top ranked gamers in India make the National Team participating in FIFA e-Football Competitions
- There are Live streams of Domestic as well as FIFA tournaments

Objectives

- To explore partnerships for taking e-Football Competitions to State and District level
- Increase market value of National level e-Football Competitions by making it offline event

COMPETITIONS

Cups & Tournaments (For Clubs)

Current State

- One National Cup Competition called the Hero Super Cup for clubs run over a month post the regular league season
- Most state level flagship cup competitions have slowly fizzled out with the move towards a national league structure in the past 2 decades
- Lack of marketing appeal a hindrance in raising adequate funding to conduct cup competitions at the requisite level

Objectives

- Spread the Hero Super Cup across the season and grow participation beyond the top National Leagues
- Revival of State level Cup competitions and creation of an Annual Cup Calendar
- Launching of a Senior Women's National Cup Competition

National Team Competitions

Current State

- Annual 4 nation tournament Hero Intercontinental Cup for Men hasn't been held since 2018-19
- Hero Gold Cup, a 4 nation tournament for Women's Football hasn't been held since its first edition in 2019

Objectives

- Revive both Hero Intercontinental and Hero Gold cup tournaments and making it a permanent fixture in the Annual Calendar
- Take Football to new venues for International Football using these tournaments

COMPETITIONS

TARGET 2026

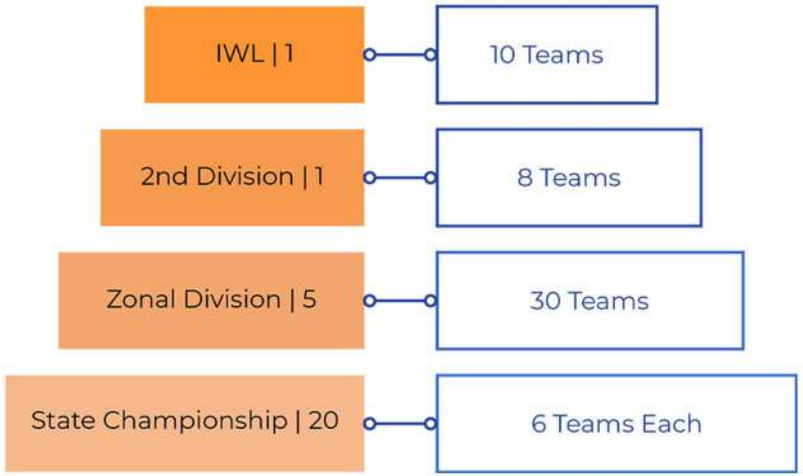
Senior Men

- 5 Level League Pyramid
  - 3 Tier National League of 40 teams
  - 5 Zonal Leagues of 12 teams each
  - A state championship structure that includes individual city & district league champions
- Multiple City/District leagues feeding into State Championships
- 700 Developmental Clubs
- 40 Professional Teams

COMPETITIONS

TARGET 2026

Senior Women



- 4 Level League Pyramid
  - 2 Tier National League of 18 teams
  - 5 Zonal Leagues of 8 teams each
  - A state championship structure of minimum 6 teams and 10 matches each
- 20 Professional Teams
- 100 Developmental Teams

COMPETITIONS

TARGET 2026

Youth Men

- Minimum 35 matches by 2027 across state & Elite league combined for all age groups
- Local State Youth League and Elite Youth Leagues to run simultaneously and clubs & academies to participate in both
- Winners of State Youth leagues to qualify for next year's elite youth league on sporting merit

Youth Women

- Minimum 14 matches by 2027 across each age group
- Minimum of 20 states to implement Women's Youth Structures by 2027
- University Championship structure in place
- Institutional League to commence from 2027 onwards

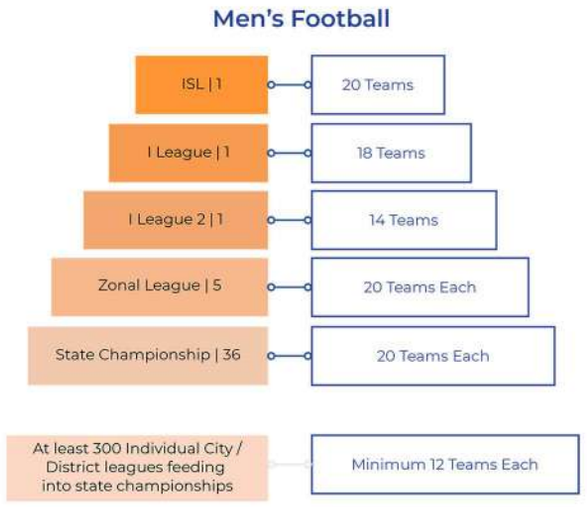
New Competitions

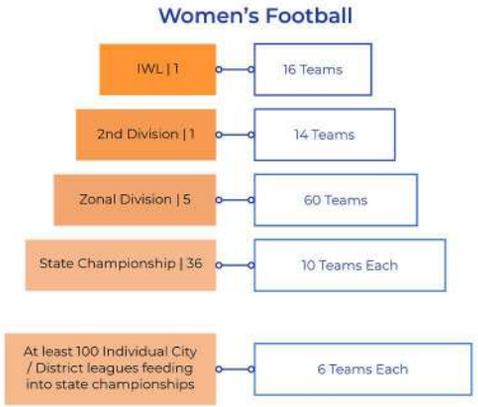
- One Institutional League for both Men and Women at the National Level
- National University League for Women
- Futsal National Football Championship for both Men and Women
- Beach Soccer National Football Championship for both Men and Women
- U21, U19 National Football Championship for Men and Women
- One National Cup competition for Women' Football
- National Football Games Launched

COMPETITIONS

VISION 2047

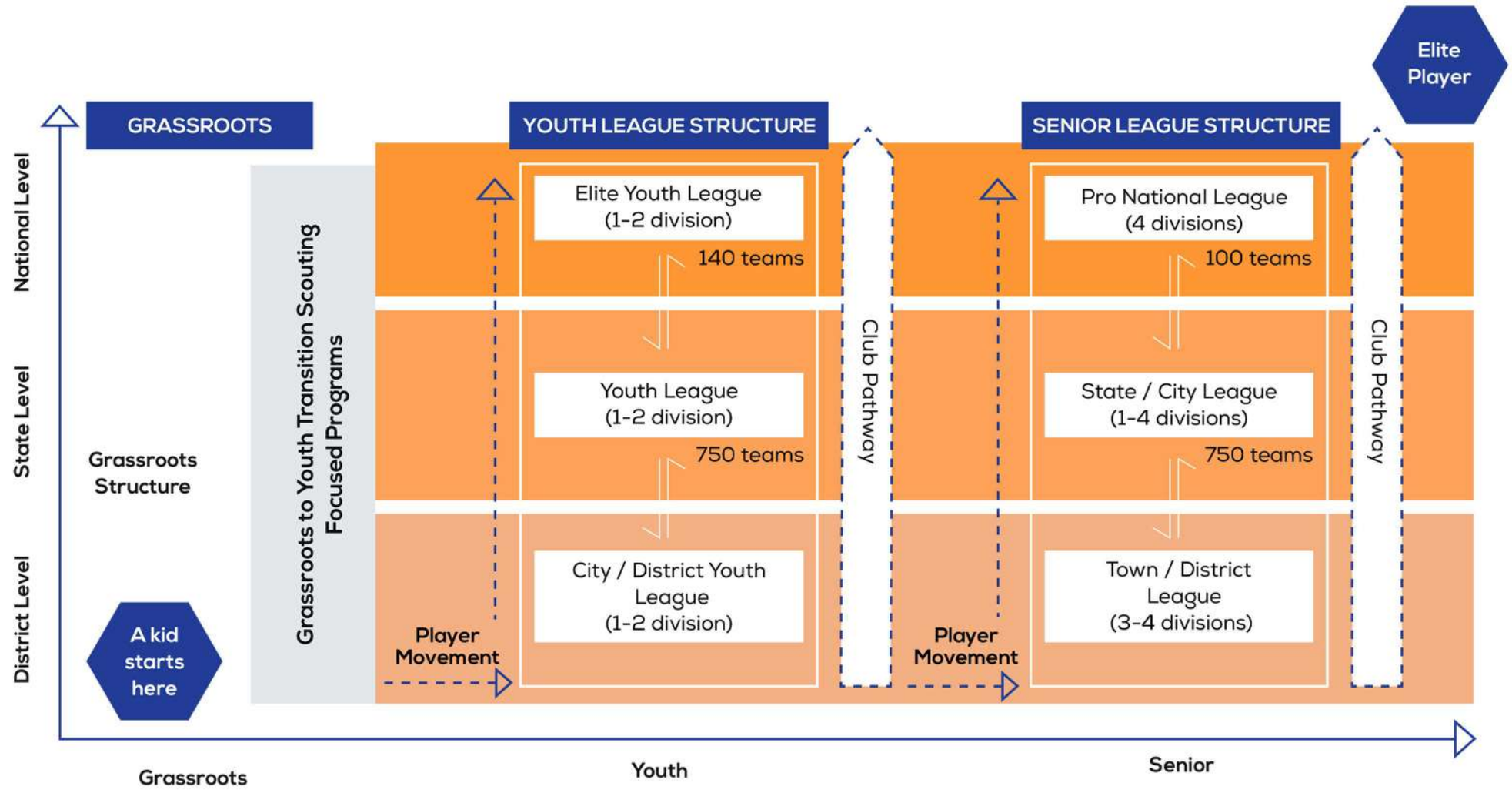
- Amongst top 3 leagues in Asia across genders
- 55 Matches across the competitive structure for a player per season
- Each State to have a vibrant competition structure with a Flagship State League and & Cup Competition for both Genders





COMPETITIONS

VISION 2047



10 NATIONAL TEAMS

GOAL

To Exhibit a brand of Football that would attract masses and produce excellence on the pitch.

NATIONAL TEAMS

The national team, largely considered a reflection of the country's culture and Football Identity. The topmost priority and the most important product of results oriented team sports it dictates the value chain and the vibrancy of the ecosystem which is heavily linked to historical success.

The level of national team performance is directly linked to the level of its respective culture, talent and competitive environment that the players are exposed to.

Men's Football Qualification Record

FIFA World Cup	Slots	Iran	South Korea	Japan	Saudi Arabia	India
1986	2					
1990	2					
1994	4					
1998	4					
2002	4					
2006	4					
2010	4					
2014	4					
2018	5					
2022	5					

AFC Asian Cup						
1988	10					
1992	8					
1996	12					
2000	12					
2004	16					
2007	16					
2011	16					
2015	16					
2019	24					
2023	24					

Olympics	Iran	South Korea	Japan	Saudi Arabia	India
1988					
1992					
1996					
2000					
2004					
2008					
2012					
2014					
2016					
2020					

AFC U23					
2013					
2016					
2018					
2020					
2022					

Played the Tournament | Won the Tournament | Did not qualify

In the last 36 years India has qualified for 3 out of a possible 34 Senior Men's tournaments, never making it out of the group stage

India has never made it into the Final round of FIFA World Cup qualifiers

NATIONAL TEAMS

Women's Football Qualification Record

	Slots	China	Japan	Chinese Taipei	South Korea	Thailand	North Korea	Australia	India
FIFA Ranking									
AFC Women's Asian Cup									
1986	7								
1989	8								
1991	9								
1993	8								
1995	11								
1997	11								
1999	15								
2001	14								
2003	14								
2006	9								
2008	8								
2010	8								
2014	8								
2018	8								
2022	12								
Total		15	15	11	13	13	11	6	6

Played the Tournament | Won the Tournament | Did not qualify | No Data

After finishing 2nd, 3rd and 2nd in the 1980,81 and 83 editions respectively, In the Last 36 Years the Women's National team has qualified for 6 of the possible 15 tournaments, never making it out of the Group stage

Our Observations

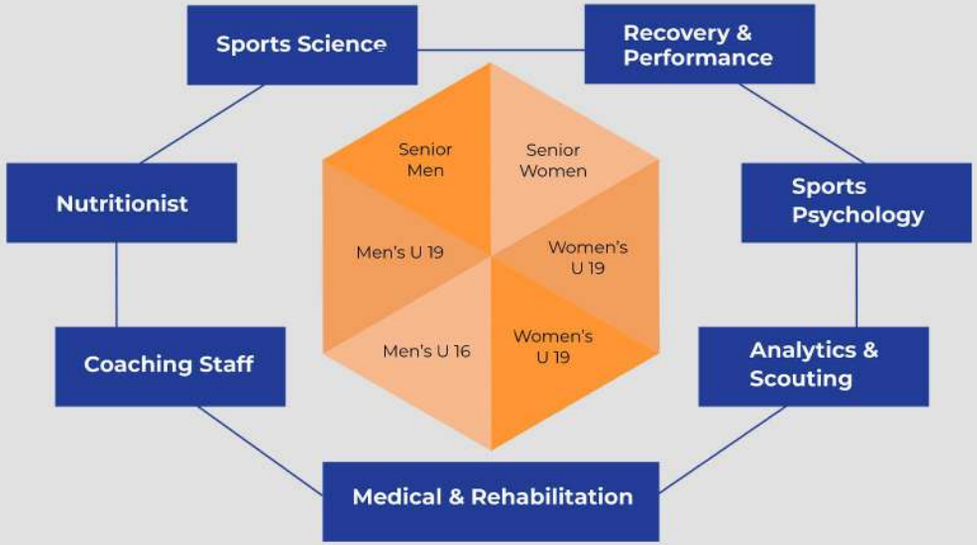
- In the last 34 years at the Senior Men's Level India has only qualified for 3 out of 34 possible tournaments on merit and has never made it past the first phase of FIFA World Cup Qualification in its entire history.
- While there has been consistent recent success at qualifying for the AFC U16 Championship, India hasn't participated at the U19 Level since 2006 when it hosted the tournament.
- While the influx of higher quality foreign players into the Hero ISL has helped raise the level of footballers, key positions in most teams are occupied by foreign players hindering the progress of Indian talents
- A short league duration and substantially lower number of domestic matches across the entire pyramid is detrimental to the optimum development of players with none of our current Men's National Team players playing in any other competitive league abroad
- There is a lack of uniform adoption of Sports Science & technology different National Team Setups.
- A lack of full utilization of all FIFA Windows throughout the year
- While India's competitive level in the Women's game is substantially higher than the Men's team, similar to the Men's teams, India is yet to qualify to a major FIFA Event on merit.
- Unscientific Scouting networks with a lack of elite player development

NATIONAL TEAMS

Our Objectives

- Maximize competitive game time available to top Indian players across the domestic season by increasing the duration and number of matches.
- Build a competitive league environment across the pyramid
- Restrict the use of foreigners below the level of the Hero I League to help groom Indian Talent in key positions
- Introduce modern Sports Science & technology
- Move to a data driven robust scouting system using the elite competition structure across age groups
- Maximize utilization of FIFA windows across the calendar year to provide more competitive international exposure
- Redefine our style of play in accordance with our National Football Philosophy
- Achieve top 6 in Asia in the Women's Rankings and top 10 in Asia in the Men's Rankings by 2027
- Strengthen Player pathways through states with stronger ecosystems & work to create new talent hubs across the country
- Making club take center stage in elite player development

New National Team Setup



- Full time Sports Science, Recover & Performance, Nutritionist and Sports Psychologist
- Clubbed Mega camps across 2 or more age groups at least twice a year
- Added focus of specialized coaching areas
- Utilization of every FIFA Window for at least 2 out of 3 age groups
- At least 3 new venues utilized by the Gold Cup/ Intercontinental Cup
- Preparation camp durations with greater focus on competitive matches

NATIONAL TEAMS

TARGET 2026

- Qualification for FIFA U17 World Cups for Both Men and Women on merit
- Top 8 in Asia in Women's Football
- Top 10 in Asia in Men's Football

VISION 2047

- Top 4 in Asia across both Men's and Women's Football

11 MARKETING & COMMERCIALISATION

GOAL

Drive creation and optimization of value across the ‘Football Ecosystem’ in collaboration with our partners.

MARKETING & COMMERCIALISATION

Of the three main pillars of revenue globally namely Broadcast followed by Commercial Partnerships and Match day revenue, the first has proven to be the fastest growing over the past two decades globally with an influx of OTT and Digital bundled into rights packages growing from around being 20% of the revenue in the mid 90s to over 40% in most European Markets.

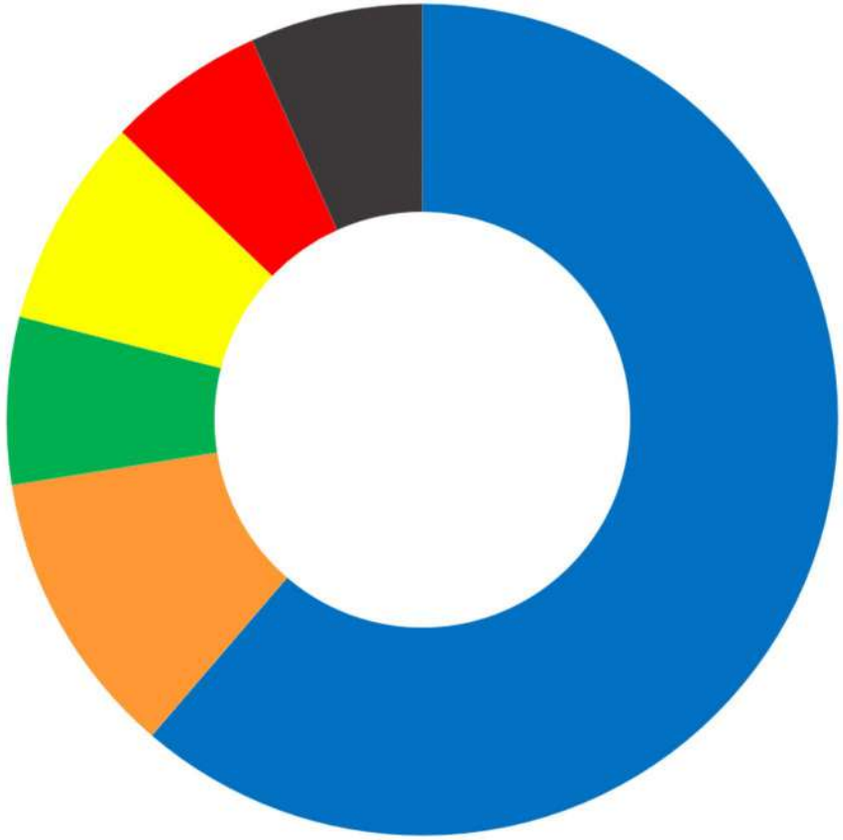
In an ever-evolving digital environment there has been a substantial shift in the way football is consumed. Brands have started to realize the vast potential and have been investing heavily in engaging consumers on digital platforms.

Our Observations

- The total Annual Budget of the AIFF is around 80Cr annually which is substantially lower than counterparts in Asia making funding the required competition structures in a vast country challenging.
- The Emergence of the Hero Indian Super League has brought in an influx of new money into the football ecosystem with most clubs functioning with annual budgets anywhere between roughly 3-6 Million USD. However it's still about 1% of the budgets of top Football Clubs Globally
- With the second largest population in the world and one of the largest fanbases of the Sport in the world, India has the potential of being the football market with the highest scope of growth globally
- Digital Media in Indian Sports is expected to grow at a CAGR of over 20% in the next decade opening a window of commercial opportunity
- Financial sustainability is a major issue in club football with almost all clubs posting major losses every year
- While Football can be categorized as amongst the top 3 most popular Sports in India certain pockets such as Kerala, North Eastern States have over 20% of Football viewership as a share of their total Sports Viewership
- With a large fanbase following European Football, viewership numbers have been affected by slow conversion into Indian Football.
- Most top football properties are not attracting enough commercial value with broadcast right revenues almost non existent
- Investment in Women's Football from the AIFF is around 1/3rd of that of Men Football
- A Lack of Significant National Team sporting success for decades at the International Level leading to low commercial value being generated

MARKETING & COMMERCIALISATION

AIFF Revenue



- 61 % Marketing Rights
- 11 % FIFA Assistance
- 7 % AFC Assistance
- 8 % Government Grants
- 6 % Coach Education
- 7 % Others

Total Revenue is Approximately **80 Cr**

MARKETING & COMMERCIALISATION

AIFF Expenditure

- 16 % Administration
- 18 % Developmental Activities
- 2 % Infrastructure
- 16 % Men's National Team
- 9 % Women's National Team
- 32 % Men's Competitions
- 7 % Women's Competition

Share of Spends

MARKETING & COMMERCIALISATION

Our Objectives

- Build an in-house 'Business & Marketing' vertical to cater to providing commercialization support to the entire ecosystem
- Maximize existing brand value and develop new IPs to market
- Have a dedicated Club & Licensing department to assist clubs through dedicated incubation programmes
- Build assets and infrastructure & generate monetization avenues
- Explore new avenues of commercial growth by diversification of revenue streams

Enhancing Market Value of existing 'properties & IPs)

- Brand Value – Invest in Marketing and Brand Building activities to enhance brand value of AIFF and its properties
- Fan Engagements – Increase fans engagement and Forster stronger relationships through 'Digital Media' & 'Offline Activations'
- National Team - Increase the popularity and brand value of the 'Blue Tigers' & 'Blue Tigresses'

Creating New 'Properties & IPs

- Start new Competitions across the pyramid in Football, Futsal and Beach Soccer and engage sponsors respectively
- Build new brands under the AIFF umbrella and diversify target audiences to broaden the reach of Indian Football
- Revival of marquee Cups and Tournaments

Diversified Revenue Streams

- Merchandising owned and secondary partnerships
- Licensing programs for sports fields, Footballs, Intermediary
- Digital Content and Rights Marketing & Selling
- Asset Creation and monetisation of assets across the country

Having a commercial Team working

- Building relationships and delivering value to partners across the pyramid
- Build brand value and visibility of Indian Football Properties
- Support through Policies & Regulations to support Clubs & MAs towards financially self-sustainability

MARKETING & COMMERCIALISATION

TARGET 2026

- Increase AIFF's revenue by 500%
- Launch 3 Flagship television properties by 2026

VISION 2047

- Achieve an average 20% CAGR growth of the Indian Football Economy over the next 6 strategic cycles

VISION 2047